$75,000 or more per year, Jaguar buys a number of fairly predictable upscale lifestyle magazines such as *Architectural Digest, Town & Country* and *Travel & Leisure*. Special interest sporting publications including *Golf Digest* and *Tennis* also make the list, rounded out by demographic editions of the newsweeklies and a host of national business magazines.

The national advertising campaign is supplemented by a substantial cooperative ad program with Jaguar dealers for approximately one-third the total budget. Dealers favor spot television geared to early and late news as well as upscale-oriented sports, but also turn to outdoor. That medium is used in West Coast markets, for instance.

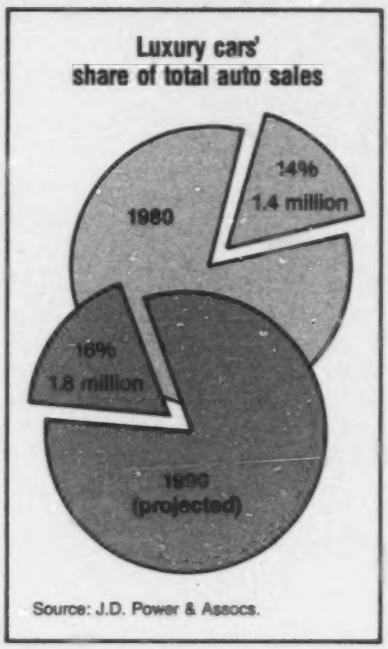
Jaguar's competitors are respectful and a bit fearful of its improvement. Says Cadillac's director of marketing, Gordon Horsburgh: "Without question, they are fixing a lot of their quality problems." He adds hastily that the traditional luxury car maker is bringing out a new Cadillac in 1987 that will be positioned against two of Jaguar's strong suits: performance and status.

Mercedes, too, is mindful of Jaguar's rapid gains. "Jaguar has staged a remarkable turnaround based essentially on improvement in quality," notes Hans Jordan, vice president of marketing. And just to make sure it retains its competitive edge, Mercedes is unveiling in the fall a newly styled car in the $30,000 price category. "It's designed to look more stylish and it could be a competitive position against Jaguar," he adds.

If this were not enough for Jaguar to ponder, competitor BMW also is trying to take a stab at the British car maker's new-found pride. Hans Bartel has announced that BMW will soon implement a Jaguar-like quality assurance project including periodic calls to customers for feedback.

Even if the competition does squeeze harder, Jaguar, if it continues its quality upkeep program, may still find itself in fine shape. Automotive analyst John H. Hammond of Data Resources Inc. notes that the luxury car segment has "tremendous long-term growth potential because of the number of households who, through dual incomes, can increasingly afford expensive cars."

Sales of luxury cars, meanwhile, continue to proceed at a far more rapid clip than the overall average. Last year, new car sales spurted ahead 11%, but the luxury car segment fired up to a 14% growth rate. But bypassing both performances was the sub-segment of the luxury class which Jaguar competes in. According to J.D. Power, the "World Class" ultra-luxury category grew by 17% last year. In addition, Power is predicting that luxury cars will continue to gain a greater share of the market, moving up from their current 14% of total car sales to a 16% share by 1990. The good news for Jaguar and its competitors is that the most rapid growth will occur in the highly profitable ultra-luxury category. Currently, world class cars only account for 12.6% of the total luxury segment, but are expected to mushroom to 19.5% by 1990, a 36% increase.



Jaguar's potential growth, however, is not boundless. Without substantial investment in further factory capacity, it can't hope to sell more than 30,000 vehicles in the U.S. By comparison, Mercedes last year sold 76,000 cars here and BMW, another 68,000.

In addition, Jaguar doesn't have a full line of cars, such as the nine different models Mercedes imports or the family of BMW series cars. Jaguar currently fields only two models in the U.S.

New models are not viewed casually at Jaguar, but several updates, including styling and technological modernizing, will soon be coming to shore. This fall, Jaguar is bringing out a cabriolet (convertible-sunroof) version of the XJ-S, its 12-cylinder grand touring car selling for $36,000. To boost sales of the pricy XJ-S from 3,600 of the total 18,000, Jaguar intends to launch in the spring a six-cylinder XJ-S. The new six-cylinder engine, only Jaguar's third since World War II, won't match the V-12's top speed of 142 miles per hour, but will be more economical to operate. It will also give Jaguar another selling point: a stick-shift model. Still under wraps is the XJ-40, a new downsized luxury sedan which will incorporate the new engine and replace the popular $32,000 XJ-6 sedan. Over 100 of the XJ-40's are being tested under rigorous conditions, but no launch date has been set, according to Dale.

Jaguar is slow to introduce either new technology or styling. The caution is understandable. The XJ-40 will replace technology from the '60's, engineering that is so highly regarded that *Car and Driver* recently singled Jaguar out for building one of the 10 best engines ever built. The XJ-40's design will replace a 15-year-old mold whose alterations have been slight, like enlarged windows and a new grill. Such tinkering comes to a style that is hard to top. J.D. Power, which this spring completed a survey of customers' acceptance of several design considerations, found that Jaguar ranked first consistently against nine other luxury car makers. The Cadillac Seville ranked second, according to Power, while the Teutonic styling of the Mercedes and BMW lagged behind.

With a five-year goal of increasing current U.S. sales from 18,000 to 30,000, Jaguar is mindful of insuring its dealership is adequately prepared. Last year, Jaguar undertook a program to buy out 20% of its dealerships, shaving the number from 186 to between 155-160, according to marketing vice president Dale. The purpose is to increase the number of cars sold per dealer from the current 95 to 150, apropos of Mercedes' impressive record of between 160 to 180 annual sales per dealer. Furthermore, some dealers are being asked to relocate to areas where

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"There Ain't No Cure For the Summertime Blues"

That's the tune advertisers will be singing this summer when they're likely to be faced with another season of declining ratings for primetime fare.

The Great American Click-Off gets underway at the end of this month. Viewers overcome by a sense of ennui begin turning their television sets off to the networks' reruns and on to independent stations and cable — especially pay cable.

This situation, in existence for a long time, is finally arousing real network concern and action. The network's share of audience has been dropping steadily for the past six years, and the falloff has been twice as steep in the spring and summer as it has in the regular season. Last summer's numbers were the worst ever, convincing the nets it was time to act.

CBS, which won the 1984/85 regular season, was the first to announce it would be presenting original programing this summer. The network says it will be airing three and a half hours a week of original programing starting in August. Furthermore, the network gives the strong impression that it is putting a commitment into its four series that has generally been lacking in summer product. For one thing, CBS is prepared to make its first-run summer programing first rate — dollarwise — at least. Estimates have it that CBS will be putting $15 million into the project.

NBC wasn't ready to make announcements at press time, but says that it too will present some original summer series. ABC, evidently more worried about climbing out of third place with its fall lineup, says it will not debut any new shows during the summer months.

CBS's shows are being described as "very basic," by Harvey Shephard, senior vice president of programing, CBS Entertainment. He is using this term to differentiate these programs from the more experimental shows like *Comedy Zone* and *Filthy Rich* on CBS, or *Buffalo Bill* mounted by NBC in previous summers.

The new CBS entries are *I Had Three Wives*, a comedy/detective hour from Warner Bros.; *Hometown*, an hour comedy resembling the film *The Big Chill*, from Paramount; *One Hogan Place*, a half-hour comedy about a female assistant district attorney in Manhattan, produced in-house; and *West 57th Street*, a magazine format program from CBS News aimed at young adults.

The reasons for the new programing strategies are hardly complex. As viewers turn off the major networks' fare, they become more accustomed to tuning in other alternative viewing choices — or worst of all, nothing. The breakdown in audience loyalty, already prevalent, could become more so as new viewing options flood the scene.

The shifting media landscape naturally has advertisers and agencies reassessing their placements. To keep the balance of power as it is, the major networks, and in particular CBS, are pursuing more aggressive and expensive tactics for keeping viewers and advertisers.

Indeed, Gene Jankowski, president of the CBS Broadcast Group, says the new summer series have been designed to provide viewers with fresh programming and to "provide new opportunities for advertisers to participate in original programs in the summer months as well." He specifically cites "media competition" as a reason for the programing moves. Adds Shephard: "What we decided was that we should do something to try to shore up the [summer] ratings. We decided to produce shows that we thought could benefit from the sampling that we'd get in the summer and, if these shows worked, they could come back as midseason replacements. And beyond that, it's trying to improve the summer numbers."

Continues Shephard, "This is a departure from previous experiments

server. "They both come 12 to a case." At the same time, new top management would often eradicate the predecessor's programs, implemented as little as 18 months before. The net result: Wilson drifted away from its markets, offered the wrong products for too long and alienated the industry with off-base marketing programs.

Assessments of what went wrong run the gamut. Gus Lachenauer, former senior vice president of sales at Wilson, now senior vice president of sales with Shasta Beverages, limits himself to a polite "benign neglect." But a more scathing comment comes from an industry veteran who says, "Wilson was a purgatory for Pepsi," meaning the executives Pepsi placed there were on their way somewhere else.

Yet there is much about Wilson that tantalizes. Although it has trimmed its line from 12,000 items to about 5,000, Wilson remains the largest U.S. sporting goods manufacturer. The firm competes in three basic areas: the fiercely-competitive $300 million tennis market, the stable $600 million golf segment, and the fragmented team business, according to wholesale estimates based on the National Sporting Goods Association's 1984 market survey. Experts estimate that sales of tennis balls and racquets brought Wilson $57 million last year, while golf equipment contributes $78 million and team equipment such as uniforms, baseballs, and basketballs, bring in another $66 million. Foreign sales kick in an additional $36 million, and diverse operations are said to add another $10 million to the coffers. Unfortunately, say observers, many of Wilson's businesses such as tennis and golf are slow-growth areas.

But former Wilson executives and industry observers agree that, in the right hands, the company could recover its status. "The Wilson name is gold," comments Don Sonandres, executive director of the Athletic Dealers Association, a group of mid-sized retailers representing 250 stores. But whoever takes it over will have to work hard. The asking price for the company is rumored to be in the $150 million range — a reflection of full book value that some say is a little steep. Last year, the company lost $16.7 million, which came on top of a $11.2 million deficit in 1983. Say several sources, the company took a $54 million write-off for good will in 1984, as well as a restructuring charge of $12 million. "That went straight to the bottom line," the company acknowledges. But the kicker, the sources say, is a huge inventory of $100 million. "That's a lot of inventory," drawls Robert E. Carr, co-publisher of *Sporting Goods Business*, adding Wilson turns its stock barely twice a year, versus an industry average of at least three times. Says Dick Wenz, Wilson's vice president of finance, "Historically, levels have been in the $80 million range. They shot up in the fourth quarter — our lead time is long, and we planned for higher sales."

Nevertheless, there is a crop of potentially interested buyers. Leading the pack is a unit of Wesray Corp., the New York based investment firm. The company, headed by former Treasury Secretary William E. Simon, specializes in leveraged buyouts.

Whoever purchases Wilson must realize that sporting goods marketing requires a different approach from traditional packaged goods selling. The industry is really a cluster of disparate segments — from archery to water skis — that do not compete with each other. The sports enthusiast tends to be familiar with the products and brands in his particular field. As a result, advertising isn't as important as stroking the dealers, who not only pick and choose what to stock, but influence purchases.

When the industry was dominated by a few companies, most equipment was bought through these dealers, whose ranks now number about 17,000. In the past 10 years, however, new distribution channels have opened, such as discount and department stores, mail-order houses and catalog showrooms.

The type of outlet determines the status of the supplier. "It's very difficult to be all things to all people," comments Thomas B. Doyle, director of information and research at the NSGA. But Wilson tries. The company deals with all channels, piping different products to mass market retailers and speciality outlets. Dealers, says marketing director David Lumley, get the advanced products, since more experienced players tend to shop there. The company just made a point of announcing its commitment to that market, where more of the tennis and golf business seems to be moving — especially since neither sport is attracting the volume of beginners it once had.

Wilson's strength, however, is in dealings with mass merchandisers and catalog houses. According to some estimates, the company does two-thirds of its business with such retailers. While the larger retailers are only too happy to carry such a well-recognized

TENNIS EQUIPMENT

		units (in 000)	average price	Total (in 000)
Racquets	(1983)	3,038	$56.04	$170,147
	(1984)	2,675	$69.49	$185,886
Balls	(1983)	—	—	$122,830
	(1984)	—	—	$129,000

TENNIS RACKETS
1976-1984
CONSUMER PURCHASES
(in millions)

Year	Units	Dollars
1976	8.6	183.7
1977	8.3	174.7
1978	4.9	137.0
1979	4.1	125.4
1980	3.4	121.8
1981	3.0	131.8
1982	3.0	157.4
1983	3.0	170.1
1984	2.7	185.9

1977-79 projections based on family households; 1980-83 based on all households.

Source: 1984 Survey, National Sporting Goods Assoc.

name, the specialized outlets where two-thirds of golf and tennis equipment dollars are spent complain that they hardly ever see anyone from Wilson.

"That's definitely been the case for the past five years," concedes Lumley. "There's no hiding from that." He notes that the dynamics of doing business at Pepsi, where the product demands intense consumer advertising, are markedly different from Wilson, where marketing operates through trade channels.

"We know what to do now," he says. When Wilson restructured in late 1983, they decided that smaller dealers had to phone their orders in, rather than wait for the sales call. Wilson has been focusing its account servicing on bigger business, defends Lumley, because other manufacturers do exactly the same thing.

In the past nine months, Lumley adds, Wilson has taken great pains to change its attitude. John M. Cranor III, the former marketing executive who became Wilson's president in January, now makes a point to talk to the buff books and attend sports association meetings, according to Lumley. But old wounds heal slowly. Fred Brooks, chairman of MacGregor, a rival team sports company, says he has yet to meet a Wilson president at an annual sporting goods manufacturers' association meeting. "And I haven't missed one since 1976," he adds. Wilson's attendance record at industry trade shows is as spotty.

By the same token, while the trade wants to have its flesh pressed, it also wants to see advertising back up a company's line. Most marketers seek a balance of high profile exposures such as televised tournaments, and buff book advertising, endorsements, and retail programs. In a well-calculated program, advertising will clue the retailer how to stock up, especially when the manufacturer has an extensive line.

Sources say Wilson spent about $27 million in advertising and promotion in 1984, making it one of the largest budgets in the industry. But to many observers, that number comes as a surprise. Wilson's standoffishness toward dealers, they say, goes hand in hand with a disregard for the sports press. "They've gone from little advertising to none," charges Carr. But, points out a former senior executive, the problem isn't that clear-cut. Even though Wilson trimmed its broad product line, under president Korn, the company has more to offer than any other sporting goods company. That makes it hard to decide where to put advertising dollars.

Last year, Wilson supported its tennis business with about $3 million in network television and magazines, according to Leading National Advertisers. Chief competitors Prince, a sudsidiary of Chesebrough-Pond's, and Head, part of AMF, each spent about $2.2 million — out of a category total of less than $9 million. Another $2.7 million backed the golf business, concentrating on higher margin products such as Wilson's line of metal-wood clubs. Support for sports equipment brings the 1984 total to about $6 million, in line with past totals.

What about the other $21 million, then? Wilson prides itself on having "the largest professional advisory staff in sports," but such contracts, or endorsements, cost money. Wilson's roster includes a long-standing contract with Jimmy Connors and Chris Evert-Lloyd for tennis; Tom Kite, Andy Bean and Hale Irwin for golf; and football's Walter Payton, basketball's Kareem Abdul-Jabbar, baseball's George Brett, among others. The company has traditionally spent between one-third and one-fourth of its budget on endorsements. That would mean the company spent as much as $9 million of the estimated 1984 budget on endorsements. Wilson lost the NBA franchise to Spalding two years ago, because the costs got too high. "The bidding got higher than we thought economically viable," says Lumley. "There's too much money being paid out." John Horan, who writes an industry newsletter, *Sports Inc.*, adds that the value of an endorsement isn't what it once was, anyway. Not only are there too many, but athletes have less impact as role models now. "The whole industry," notes Horan, "has seen a cutback in endorsements."

Observers speculate that Wilson's promotion budget may have shot up last year as it tried various campaigns and tie-ins to unclog some of its inventories. In other aspects of the marketing plan, say observers, Wilson is in another league entirely. Take dealer incentives as an example. Other sports companies give dealers a straight percentage off the top for exceeding a certain level of orders, or perhaps another, smaller incentive for early payment. Wilson's programs, on the other hand, are so complex, say dealers, even the company's own sales force doesn't always understand them.

Roger Gundersen, vice president of institutional team marketing, attributes this reaction to a recent change in the structure of the marketing department: the addition of specialists. Where before Wilson had three people involved in developing programs for the three business lines, the company now has one in every product category — one

GOLF EQUIPMENT

		units (in 000)	average price	Total (in 000)
Clubs	(1983)	10,515	$35.00	$368,025
(individual)	(1984)	10,299	$30.86	$317,827

SETS OF CLUBS
1976-1984
CONSUMER PURCHASES
(in millions)

Year	Units	Dollars
1976	12.1	239.6
1977	11.0	236.2
1978	9.1	200.7
1979	8.7	216.6
1980	7.5	194.5
1981	6.5	199.9
1982	7.8	255.7
1983	10.5	368.0
1984	10.3	317.8

1977-79 projections based on family households; 1980-83 based on all households.

Source: 1984 Survey, National Sporting Goods Assoc.

for golf balls, another for clubs, yet a third for bags. "They're parochial about their product lines," comments Gundersen, adding that each specialist is responsible for developing his own incentive program. The result is a proliferation of complex programs. A recent program for Wilson's Jet basketball, for example, mixes rebates and percentage discounts into a six-layer program.

> **"The sporting goods industry has a history of up and down pricing. And our policy is strictly one price for all. We don't sell anything under cost."**
>
> DAVID LUMLEY
> marketing director,
> Wilson Sporting Goods

Because the discounts are so difficult for dealers to calculate, the company has been accused of selling products at different prices across the country. Such confusion fuels competitors' anger with Wilson's overall pricing. "Their answer to a problem in the market is 'cut the price,' " sniffs the chief executive of a rival company. He and others chide Wilson for abandoning its price leadership position by offering products at or below cost — instead of at a premium. "It's the old 'lose money on one item and make it up in the volume,' " says the executive. One reason other manufacturers are annoyed with Wilson is that the industry has increasingly felt competition from foreign manufacturers. Indeed, price competition in this low-margin industry has forced as much as 50% of all manufacturing offshore. Critics call for Wilson, the largest producer of tennis racquets and one of four major team suppliers, to keep prices as high as the market will bear.

These accusations make Lumley angry. "We don't sell anything under cost," he says, waving away with a single sentence tales of cut-rate baseballs collected from various industry sources. As for Wilson's overall pricing strategy, he answers hotly, "The sporting goods industry has a history of up and down pricing. And our policy is strictly one price for all."

Another management direction that may have hurt Wilson is the company's relationship with parent Pepsi. Former executives charge that Pepsi-thinking often had too great an influence on the company's direction and decision-making. Wilson executives, charge detractors, have made their product line decision with little input from the field staff or dealers. By contrast, MacGregor's Brooks is said to spend weeks every year touring the country and visiting dealers to learn marketplace needs. But Gundersen, a 30-year veteran of Wilson, says Wilson is now operating differently. "More line decisions about the products are made by middle managers now," he says.

Executive musical chairs has taken its toll in other ways. Some observers charge that the company is overstaffed. This may be the relic of an "entrepreneurial" experiment of the late 1970's, when the company was divided into three divisions (golf, tennis, and team sports), says Lumley. The sales staff has fluctuated from 180-strong to 227, to a current 143. Meanwhile, the accounting department still has 220 people.

At the same time that Wilson was indulging in structural reorganization ("We weren't the only ones," defends Lumley), the company made its most frequently cited blunder.

It occurred in the tennis market. American's love affair with the sport peaked in 1976, with sales of 8.6 million racquets — compared to the three million units sold in each of the last four years. That same year, Howard Head invented the oversized Prince tennis racquet. But Wilson saw only its commanding 66% share of the wood racquet business, itself 80% of the total market. And when the consumer either turned off tennis or switched to the new flexible metal racquets, Wilson continued producing its top selling Jack Kramer model and other wooden racquets.

By the time Wilson realized that category sales would never return to their $90 million peak, the company continued to hang on to its inventory, waiting for the right time to take a loss. "If you had wood racquets," quips one observer, "the best thing to do was burn them and keep warm in winter." Industry veteran Carr adds, "Wilson was calling press conferences to introduce its 7% larger ball, and giving the racquets away at the same time. It's a novel approach to writing off inventory," he laughs. The red ink poured in 1983 when the company finally closed its plant. "That started us on a downward spiral," admits Lumley. The following year Wilson dumped as much of its unpopular inventory it could in mass outlets. Still, Wilson has come back in a fashion. With its new composite and graphite racquet lineup, "Wilson is number one or two in units, depending upon what numbers you look at," says Prince's vice president of marketing, Ed Volkwein. Tennis now means a $57 million business to Wilson, of which almost $40 million is in tennis balls.

The revolving door in the executive suite has also affected product development in both funding and direction. It wasn't until 1979, for example, that Wilson introduced a licensed copy of the Prince design — long after the size issue had disappeared. Other new product introductions have fallen flat: vitamins packaged in tennis ball cans; colored golf balls, just as the golfing world was returning to white. The newest entry is a tennis ball 7% larger in diameter than the standard, but the same weight. The innovation, unacceptable to the US Tennis Association, is aimed at beginning players — of which there seem to be fewer every year. Though the industry does not seem overly excited, Gundersen contends that they are "significant innovations. They will take a while to build."

Product development priorities changed as quickly as the name on the door of the executive suite. A former executive recalls that Wilson spent between $2 million and $4 million developing a computerized home gym, only to have word come down from Pepsi that the project wasn't top-of-mind anymore. Current executives do not recall the incident. As for present efforts, Wilson has just installed a $2 million computer-assisted design system to speed up R&D.

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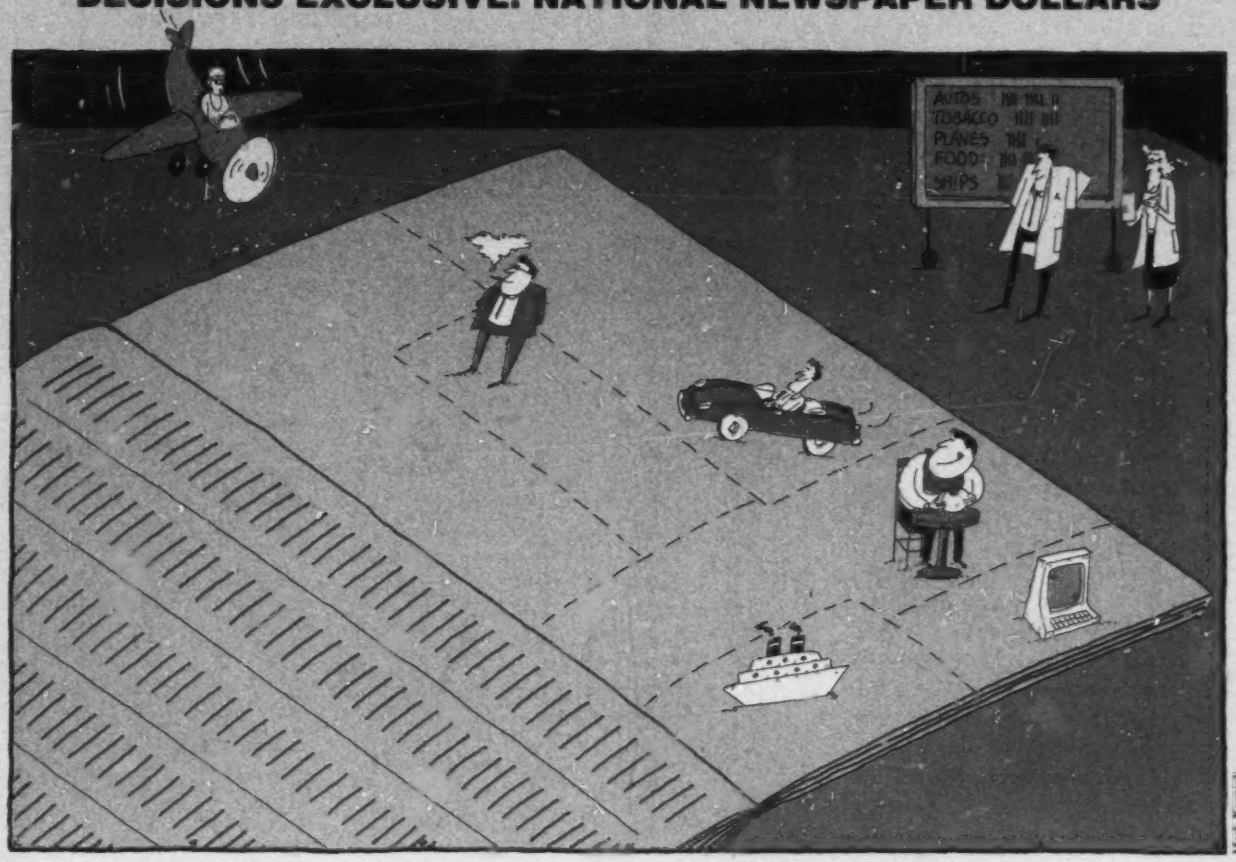


1984 BRAND LEADERS IN NEWSPAPERS

Newspapers ran record volumes of advertising once again in 1984, according to the Newspaper Advertising Bureau. National advertisers spent $3,035,000,000 last year — an increase of 11.0% over the 1983 total.

The percentage increase was slightly below last year's 11.6%, which brought the dollar total at that point up to $2,734,000,000. A look back through the 1980's shows similar increases each year: from $1,963,000,000 in 1980, to $2,265,000,000 in 1981, and to $2,450,000,000 in 1982.

Auto manufacturers continued to hold a comfortable lead over all other categories of advertisers, with $400,631,000 invested in daily print advertising. This figure was a whopping increase of nearly 23% over 1983, as compared to a lift of only 4.5% in that year, over 1982.

Equally significant was the fact that airlines zoomed past cigarettes to become the second largest category. The airlines spent a total of $264,223,000 for an overall gain of 6.7%. They winged their way to such lofty heights mainly on the strength of increases by domestic carriers (14.5%) and cargo lines (48.4%) — enough to overcome a 6.0% drop in investments by international carriers.

Cigarettes, on the other hand, reflecting the sales slowdown in their industry, cut down their print advertising by 6.9%. The drop, to a total of $232,502,000 put the category in third place after it had been number one two years before. The decrease was, however, a much smaller one than the 19.7% it shrunk by in 1983, or the 18.1% it went down in 1982. By far the biggest losses took place among 1983's top five brands, with the most dramatic example involving Player's, a new brand, and 1983's spending leader. The Philip Morris smoke disappeared from the rankings, after investing almost $24 million in 1983.

There were some interesting trends evident among other advertisers. The most dramatic was the rise of computers, which were designated as a category separate from other office equipment this year by Media Records.

Computers spent an impressive 38.2% more in 1984, becoming the seventh largest category, with $122,427,000 in total expenditures. The remaining brands in office equipment also spent a lot more on print — a 27.8% uptick to total $10,183,000.

From looking at other categories that spent significantly more on newspapers, it would be difficult to tell if America has really begun its supposed transformation to a service economy. Professional and service advertisers did spend $19,171,000 in the dailies in 1984, an increase of 109.8%. Then again, the makers of aircraft spent $3,119,000, up 45.7%, and the manufacturers of industrial materials and machinery spent $13,881,000 — an increase of 30.8%.

Once again, Americans were urged to travel more. Tours and travel services made up the sixth largest category, spending $147,031,000, or 21.7% over what they spent in 1983. And railroads and steamships more than kept pace with their competitors in the sky, increasing by 30.1% and 14.8%, respectively. Among modes of transportation, only bus lines decreased (16.3%), and they had increased their spending sharply in 1983.

Others urged Americans to spend some time relaxing or learning. Radio and tv stations, up 10.1%, were the fifth leading advertisers in print, spending $155,108,000. Also up were books (12.8%), magazines (3.4%), and newspapers (27.9%).

Real estate brokers tried harder than ever to attract the attention of those who did want to settle down. They spent $48,273,000, up some 29.8% over 1983's total. And the combined furnishers of all those new houses spent 26.5% more than they had the year before — up to a new total of $21,823,000.

Public services utilities and communications corporations were the fourth largest advertising category in print, spending $174,593,000 in 1984. This increase of 28.6% over 1983 was due largely to the breakup of AT&T into seven new telephone companies, and their innumerable subsidiaries.

And finally, the makers of medical products and drugs spent 2.9% more to advertise their products than they did in 1983 — an increase due largely to the heightened sales pitch in the papers by digestive aids, laxatives, headache remedies, and sedatives. Also, as might be expected in a presidential election year, political advertising was up 109.8%. (Could this have had anything to do with the increased pitch of headache and stomach remedies?)

There were some significant advertisers that bucked the overall trend and spent less on newspaper space than they had in 1983. The combined categories of foods were down a total of 11.1%, with every group but diet soft drinks, fruits and vegetables, meats/fish/poultry, prepared dinners, and soups cutting their print investments.

Household supplies categories dropped a combined 4.3%, to $39,941,000, with the big drop coming in aluminum and paper products (59.6%). Except for shaving equipment, all toiletries and toilet goods spent less in the papers — 39.5% less to be exact.

Advertisers apparently felt that Americans needed less inducement to look sharp and to entertain themselves at home. Clothes advertisers spent $39,589,000, a 20.1% reduction from 1983. Sporting goods dropped 29.1%, and hobbies, toys, and games were down a combined 56.4% — from over $9 million to a little less than $4 million. Not even Trivial Pursuits could make up for the great decrease in

Newspaper Automotive Dollars Where They Come From

Rank	Brand	1984 Newspaper Investment	Total (100%) Truck pick-ups campers	Total (100%) Auto	Percent of auto total (100%) from: Factory	Dealer assn.	Local dealer
1.	Chevrolet	$37,935,000	7%	93%	12%	6%	82%
2.	Ford	35,194,000	11	89	14	21	65
3.	Cadillac	21,740,000	—	100	3	4	93
4.	Dodge	18,455,000	13	87	20	4	76
5.	Oldsmobile	16,403,000	—	100	14	12	74
	Top 5						
6.	Chrysler	15,531,000	—	100	13	5	82
7.	Toyota	15,319,000	30	70	20	4	76
8.	Buick	14,901,000	—	100	14	15	71
9.	Lincoln	14,440,000	—	100	17	22	61
10.	Nissan	13,134,000	27	73	15	10	75
	Top 10						
11.	Pontiac	8,557,000	—	100	12	41	47
12.	Honda	7,633,000	—	100	21	5	74
13.	Volkswagen	7,540,000	2	98	50	24	26
14.	Mercury	6,496,000	—	100	12	51	37
15.	Mercedes-Benz	6,507,000	1	99	41	—	59
	Top 15						
16.	Jaguar	6,352,000	—	100	49	13	38
17.	BMW	5,960,000	—	100	53	16	31
18.	Volvo	5,599,000	—	100	55	12	33
19.	American	5,102,000	6	94	4	27	69
20.	Subaru	4,552,000	—	100	12	16	72
	Top 20						
21.	Saab	4,239,000	—	100	76	5	19
22.	Porsche/Audi	3,347,000	—	100	37	21	42
23.	Mitsubishi	3,180,000	36	64	14	14	72
24.	Mazda	3,021,000	38	62	17	0	83
25.	Peugeot	2,798,000	—	100	35	5	60
	Top 25						

Source: Media Records

spending by the makers of electronic games.

The data that follows is published exclusively by *Marketing & Media Decisions* under an arrangement with Media Records. It tells of the spending activity of the top three brand leaders in each category, the summary of total expenditures by each category, and the leading 100 corporate spenders in national newspaper space.

The full report is available from Media Records, at 370 Seventh Avenue, New York, NY 10001, for $1,125. Product classification reports range from a high of $325 for a complete class breakout, to $115 for a sub-class.

Automobiles

Chevrolet took the top spot in newspaper advertising back from Ford in 1984, as it increased its investment in print by a whopping 62%. Ford, in second place, increased its spending by nearly 11%, putting the two companies far ahead of the rest of the pack. Chevy spent $37.9 million for the year, and Ford $35.2 million — figures that include spending by the passenger car factories, dealer associations, and local dealers, as well as the amounts spent on trucks, vans, and campers.

The two auto giants opened up a huge lead over Cadillac, the perennial third-place print advertiser. Cadillac was one of the few automotive manufacturers to decrease its newspaper space this year, reducing it by a little over $1 million (5%). Even when the amounts allotted by Chevrolet and Ford to trucks and recreational vehicles are deducted, they each outspent Cadillac by over $10 million.

The origins of Chevrolet's advertising dollars remained roughly in the same ratio that they were last year — reflecting a general trend in the top 25 manufacturers (see accompanying chart on page 102 for a full breakdown). About 12% of its print advertising came from the factory, 6% from dealer associations, and the vast majority — 82% — from local dealers. The only major change in advertising dollar distribution this year came from Ford, which increased local dealer ads from 47% to 65% of total output.

Looking back over the first five years of the '80s, one can see that Chevrolet has put its newspaper dollars on a rollercoaster ride — although the overall total has more than doubled in five years. Ford's spending has been a little less erratic, while attaining the same results, and Cadillac has decreased its newspaper spending slightly in the two past years, after steady increases from 1980-83.

The newspaper ad market was in the pink of health among the top 25 manufacturers. Besides Cadillac, only Mercury, Mercedes-Benz, Porsche/Audi, and Renault decreased their spending last year, and the first two only by small amounts. Renault cut its spending by nearly 37%, and was the only manufacturer to drop out of last year's top 25. It was replaced by Peugeot, which returned to the list after a one-year absence.

Elsewhere, the trend was quite the opposite. Chrysler was knocked out of the top five by Oldsmobile, despite spending $1.5 million more than in 1983. And Honda was knocked out of the top 10 by Lincoln, its increase of $800,000 not withstanding.

Airlines

The top three airlines in newspaper advertising remained the same in 1984, but their competitors were able to close some of the gap between them. Delta was still first, with expenditures of $26.3 million, while TWA was second with $21.4 million. Eastern was third with $18.6 million.

But all three reduced their spending, in marked contrast to overall increases of the previous five years. Delta's spending was down by 21% from 1983 — after increasing that year by 29% over 1982. Eastern's spending was down by a similar 17%, TWA took a less dramatic plunge of only 2%.

The rest of the airlines' top ten

Top 20 cigarette brands expenditures in newspapers

Rank	Brand	Newspaper investment 1984	1983	1982
1.	Marlboro	$ 29,328,000	$ 11,062,000	$13,207,000
2.	Merit	18,809,000	9,286,000	23,681,000
3.	Vantage	17,754,000	10,953,000	9,978,00
4.	Kool	17,574,000	11,031,000	19,138,000
5.	Century	16,341,000	14,472,000	—
	Top 5	$ 99,806,000	$ 56,604,000	$ 66,004,000
6.	Benson & Hedges	13,296,000	8,127,000	27,039,000
7.	More	10,651,000	13,536,000	12,800,000
8.	Camel	10,640,000	13,801,000	11,290,000
9.	Sterling	10,556,000	—	—
10.	Winston	8,683,000	12,108,000	19,571,000
	Top 10	$153,632,000	$104,376,000	$136,704,000
11.	Doral	8,652,000	—	—
12.	Now	7,503,000	8,415,000	17,206,000
13.	Kent	5,603,000	8,508,000	9,770,000
14.	True	5,528,000	3,838,000	7,655,000
15.	Satin	4,573,000	8,836,000	359,000
	Top 15	$185,491,000	$133,973,000	$171,694,000
16.	Eve	4,375,000	—	—
17.	Virginia Slims	4,127,000	4,241,000	9,312,000
18.	Bright	3,604,000	21,980,000	10,194,000
19.	Richland	2,058,000	2,222,000	—
20.	Barclay	1,906,000	11,720,000	13,851,000
	Top 20	$201,561,000	$174,136,000	$205,051,000
	All other	$ 32,941,000		
	Total	$234,502,000		

Source: Media Records

spenders were more sanguine about newspapers. They were, in order, Continental, American, Braniff, Pan Am, Northwest Orient, Republic, and People Express. Of these, only Pan Am and Republic reduced their print spending, Republic by 21%, and Pan Am, continuing its tendency since 1982, by 40%.

But most of the top 10 — and indeed the leading 20 — airline carriers increased their spending. The biggest single increase by one of last year's leaders was People Express, which took tenth place with an enormous 310% increase in its spending. Continental was up a healthy 45%, and Braniff made an auspicious return to the print medium, after sitting out last year while it reorganized. It took sixth place, spending $11.8 million.

To attract international travelers the big three airlines spent roughly the same percentage of their newspaper dollars that they did in 1983. Delta's percentage was up about six points, to 22%, while Eastern's fell two points to 33% and TWA's stayed almost exactly the same.

The foreign carriers' leader this year was Air Canada (18th overall, with expenditures of $4.1 million). The top five foreign carriers increased their spending considerably. British Airways fell from first in 1983 to second last year, despite a $600,000 increase. And print spending by a couple of lines from south of the border really took off: Aeromexico and Mexicana fought their way into the third and fourth spots, respectively, for foreign carriers. The second five foreign leaders, however, spent less on print than did the second five in 1983.

There was a big turnover among the leaders in cargo carriers. Federal Express became the 20th leading airline overall, increasing its spending by over 300% to a total of $3.6 million. It was followed at a great distance by Purolator Courier, with $553,000 in expenditures, and Quick International Courier, with only $97,000. Last year's leader, Emery, decreased its newspaper spending from $1.3 million to only some $16,000.

Cigarettes

Cigarette ads declined but spending by individual brands fluctuated wildly.

Cigarettes continued to be a volatile category when it came to newspaper advertising in 1984. The overall trend of decline in the past two years continued, but spending by individual brands fluctuated wildly. Last year's leader, Player's, disappeared from view entirely. Manufacturer Philip Morris slashed ad support for the brand altogether in the print medium.

Its lead place was taken by another Philip Morris brand, Marlboro, which increased its spending by 62%, and moved up from the eighth position in the field. Marlboro spent a total of $29.3 million in 1984 — over $10.5 million more than Merit (also a Philip Morris brand), the next biggest spender in the print medium.

Merit is a prime example of the field's indecisiveness about newspapers. In 1981, it spent $38.1 million in print, more than any other brand. This amount dropped to $23.7 million in 1982, then plunged to $9.3 million in 1983, relegating the brand to 12th place. Merit then doubled its newspaper expenditures in 1984, regaining the second spot with $18.8 million.

Vantage, the number three brand in cigarettes this year, followed a similar pattern. After decreasing its spending by more than two-thirds in 1982, it increased its print dollars by about $1 million in 1983, and by $7 million in 1984. This brought it up from 10th place, with a total of $17.8 million.

The pattern was the same throughout the top 20 cigarette brands (see accompanying chart). Of last year's top five, only one — Reynolds' Century brand — remained there this year. Those brands with the largest reductions included Barclay, which cut its spending by 84% and fell from seventh to 20th place; Satin, which cut its spending almost in half, but only fell from 13th to 15th; and Bright, last year's second leading brand, which fell to 18th after another 84% decrease — this one from $22 million to $3.6 million.

But few brands from 1983's top 20 actually fell off the 1984 list altogether. Besides Player's, the only missing were Salem and Lucky Strike. Salem cut down from its brand-leading total of some $30.7 million two years ago to $9.7 million in 1983, and $1.3 million last year. Lucky Strike was struck from the list after its 1983 total of $2.2 million shrunk to only $800,000 in 1984. Lucky Strike's reduction continued the general trend of American Tobacco away from newspaper advertising in the last two years.

On a more positive note, there were also some considerable increases in newspaper advertising. In rounding out the top five, Kool increased its spending by $6.5 million, and Century spent nearly $2 million more. And Benson & Hedges went from the 16th spot to sixth on the strength of a $5.1 million increase. Three brands made strong debuts on the top 20 chart, replacing the dropouts. They were Sterling ($10.6 million, ninth place), Doral ($8.7 million, 11th place), and Eve ($4.4 million, 16th place).

Computers

Computers continued to be a booming source of newspaper advertising money in 1984, despite a sharp reduction in spending by the 1983 leader. Texas Instruments, which spent $16.7 million on print in 1983 to top the category, paid out only $1.7 million in 1984. But it was more than amply replaced.

IBM was the major source of new dollars, punching up its spending by a hefty 331%, to a new total of $33 million. Increases by the other leaders were also substantial, if not so spectacular. Epson was second, spending $9.7 million, up from $7.2 million the year before. Third was Hewlett Packard, increasing its investment in print to $4.6 million, from $3.9 million in 1983.

Foods

There are 22 subcategories detailed by Media Records under the heading of food. Excluding beverages and miscellany, the leaders are, in alphabetical order, bakery products, condiments, confectionery and snacks, dairy products, meats/fish/poultry, prepared dishes, and shortening/oils/margarine. A rundown of these leaders and other

subcategories of note follows, in alphabetical order.

Bakery products: Nabisco decreased its print expenditures by just over one-third of 1983's total, but maintained a wide lead, paying out $2.2 million.

Second place, however, was a surprise. Frito-Lay's Grandma's Cookies brand displaced Pepperidge Farm, which had been first or second in this category throughout the 1980s. Grandma's increased its spending from $82,000 to $825,000 — while Pepperidge Farm reduced its print advertising dollar by 24% from 1983, to $571,000.

Cereals: This continued to be an unpredictable category in 1984, full of dramatic rises and plunges in spending. The three leaders — Kellogg's, Post, and General Mills — did remain the same from 1983, with the only change being that Post replaced General Mills as number two.

But that was hardly the whole story. Kellogg's maintained a comfortable lead, but cut its print budget almost in half — down to $1.2 million — after a considerable increase in 1983. And that 1983 increase followed large declines in spending in 1981 and 1982.

Post has been on the same seesaw in the 1980s, increasing and decreasing its newspaper ad spending by substantial amounts every other year. In 1984, it was up to $935,000 — an increase of 216%.

And General Mills seems to have joined the general restlessness, after keeping its budget fairly steady from 1980-82. It quadrupled its print spending in 1983, largely on the basis of nearly a million dollars spent on Cheerios and Wheaties alone. But in 1984, the amount appropriated for those two cereals was back down to almost nothing, and General Mills as a whole decreased its spending by close to two-thirds, down to $613,000.

Condiments: The leading condiment brands decided to hold newspaper advertising in 1984, as this category took a major drop. Prego and Hunt's, the two leading condiment print advertisers in 1983, dropped almost completely out of sight, reducing their spending by over $1 million each. Heinz moved from third to first, despite spending only $582,000 — a decrease of 36%.

Diet sodas spent more in 1984, but were more than offset by big cuts in non-diet spending.

Vlasic pickles, which has spent greatly fluctuating amounts in the print medium over the last four years, increased its spending fourfold, to $463,000, to take over second place. Ragu, after a large decrease in 1983, went back up by 27%, to a third place figure of $413,000.

Confectionery/snacks: The snack leaders nibbled a lot less at print in 1984. Spending took a deep dip last year, with no brand near the $1-$2 million usually needed to lead the field. And there was a great deal of turnover, with all three of 1983's leaders drastically reducing their investments.

On the positive side, Nabisco, this year's leader, has doubled its spending in each of the last two years. It reached a height of $654,000 in 1984. And Nestle was a close second with $643,000, after spending nothing on newspaper print in 1983. Peter Paul Cadbury was third with $338,000, a slight reduction from the year before. M & M /Mars and Hershey, last year's leaders, reduced their spending by about $800,000 and $900,000, respectively.

Dairy products: Kraft continued its perennial leadership, spending $1.4 million in 1984 — an increase of 29% over 1983. It held a wide lead over Light 'n Lively, despite the latter's more than doubling its previous year's investment, bringing it up to $734,000. In third place was Country Line with $646,000, an increase of some 146%.

Sealtest, 1983's second leading print advertiser in this category, reduced its spending by $800,000, while Coffee Mate, number three in 1983, made no recorded expenditures for print advertising whatsoever.

Fruits and vegetables: Birds Eye vegetables moved up from third to first, increasing its spending 42% to a total of $446,000. In second place was French's potatoes with $423,000, an increase of 44%. Sun took third with $258,000, an increase of some $39,000.

Ore-Ida potatoes, the field's leader in 1983 and 1982, reduced its 1983 budget by about three-quarters, to finish far behind the current leaders.

Meats-fish-poultry: Hormel held a wide lead, as it has throughout the 1980s, spending $5.1 million in 1984. Its healthy increase of 19% over 1983 reflected a heavy overall trend of increased print expenditures since 1980. Wilson meats was a distant second with $1.4 million, representing an increase of some $300,000. Mrs. Paul's frozen fish products put out print ad bait in the sum of $873,000 — an increase of 48% over 1983.

Banquet, last year's second highest newspaper spender, completely reversed its enormous increase of 1983, decreasing its outlays for print by about $1.3 million.

Prepared dishes: On-Cor Frozen Entrees took over first place in this category, which for the second year in a row was highly volatile. The move to first crowned a series of regular increases for On-Cor since it began to invest in print advertising in 1981. Its spending has increased steadily since then — though never quite so dramatically as its 202% ballooning in 1984, which brought it up to a total of $902,000.

The next two highest finishers made similar investment increases in 1984. Banquet spent $673,000, a 184% increase. Van de Kamps spent $447,000, an increase of 306%.

On the other hand, Jeno's, the 1983 leader in prepared foods, cut its print advertising budget by four-fifths. Buitoni, which had come up to number two after spending next to nothing in the previous two years, made no recorded expenditures in the field in 1984.

Shortenings-oils-margarines: Imperial products widened its lead over Mazola products, with both making hefty additions to their 1983 expenditures. At $881,000, Imperial's print ad budget was up 56%, while Mazola's increased by 39%, to $633,000. Fleischmann's products took over the third spot from Wesson, which made

no recorded print expenditures at all in 1984. Fleischmann's 1984 total of $328,000 represented a 49% increase over 1983.

Lotteries

The District of Columbia took over first place in lottery newspaper advertising, more than quadrupling its 1983 total. D.C. spent $920,000 in the papers in 1984, for a lottery that it only began advertising the previous year. It was followed by two traditional leaders in the field: Massachusetts, which spent $858,000 (an increase of 96%), and New York state, which spent $702,000 (a decline of 12%).

Soft Drinks

Coca-Cola regained the top spot from Pepsi in what was overall a depressed year for the newspaper advertising category. Spending was cut, often drastically, all down the line of fizzy, non-diet beverages, overwhelming the increases in diet ad spending.

Coke itself spent 9% less than it had in 1983. It paid out a total of $3.9 million.

Pepsi, after a huge 116% increase in 1983 that gave it the newspaper lead for the first time, promptly cut back on its spending by 37%. It fell back to second, with $3.3 million.

Seven-Up, traditionally the third largest soft drink print spender, held on to that post again in 1984. It cut back its own spending by 35%, keeping it far behind the leaders with a total of $1.1 million.

All of the other leading soft drink brands made similar reductions in their newspaper investments.

Couponers

Co-op couponing (free-standing inserts) continued its remarkable boom in the '80s, with giant Vlassis Inserts opening up a wide lead in the field. Vlassis' investment was $99.3 million — an increase of 61% over 1983, and 155% over 1982. Newspaper Co-op Couponing/BFD Color Inserts, which had cut its investment by 11% and dropped into third place in 1983, came back a strong second. It had a 120% increase in 1984, for a total of $79.6 million. Blair Inserts, which had been second in 1983, dropped down to third, with an increase of "only" 32% that brought its investments up to $74.9 million.

In figuring the totals for couponers, the money invested by the individual participants is not included in the individual company/brand totals. However, money spent in the national and local supplements is allocated advertiser by advertiser.

Mail order

Franklin Mint paced the field again, with expenditures of $6.7 million. This was, however, a drop of 20% from 1983, sharply accelerating a downward trend that began in 1981. Other heavy hitters in the field were more optimistic about the ability of the papers to get them customers. Shopping Mart spent $5.3 million, which continued its steady, if unspectacular, trend of increased investment since 1980. Fingerhut Corporation, at number three, spent $2.9 million — far behind the leaders, but still an increase of 160% over 1983.

Magazines

Magazines continued to be unpredictable in 1984 when it came to advertising in their print cousins. *Woman's World* vaulted into first place, with an investment of $2.5 million — an increase of 344% over 1983. *Fortune* was also a climber in '84, coming in second by spending $1.9 million — an increase of 113%. In third place was *TV Guide*, which reduced its spending 62% after finishing first in 1983. Its total in 1984 was $1.7 million.

Radio/tv stations

There was no change in the print advertising leadership of this field, just more money spent. ABC was the leading investor for the second year in a row, spending $12.1 million — an increase of 19%. NBC was second again, increasing its spending by 29%, to a total of $10.1 million. CBS was third, as it has been throughout the '80s, spending $9.6 million — an increase of 44%.

Beers

Budweiser continued to be the runaway print leader among beer brands in 1984, and Anheuser-Busch took second place as well, with the campaign for its new, low-alcohol beer, LA. Bud spent $2.2 million — almost exactly as much as it had in 1983. LA's spending totaled $1.6 million in print. Miller took third place despite reducing its spending by 18%, to $1.3 million.

Cameras–photo supplies

Kodak maintained its lead in this field for the fifth straight year, despite a 30% reduction in newspaper spending. Kodak's expenditures totaled $3.6 million — still enough to keep it in first place by a substantial margin.

In second place was Canon, with an abrupt increase of 378% that brought its newsprint spending up to $2 million. Third was RCA's video camera, which spent $1.7 million for space in the papers after paying out virtually nothing over the previous two years. The number two and three spenders in 1983 — Polaroid and Clark Color — dropped down after reducing their print budgets by $700,000 and $600,000, respectively.

Coffees

A decaffeinated brand led this depressed field for the second year in a row. Sanka spent $750,000 in the papers on trying to attract those drinkers who want a few less perks. This kept it the leading spender among coffees, but still was a 16% drop from 1983. It was also way down from the $1.2 million spent by Maxwell House to lead this beverage category in 1982.

In second place was Chock Full O' Nuts, which reversed a sharp two-year slide in spending by paying out $465,000 for print — a 1,092% increase over 1983. Third was Nescafe, with $192,000. This was a 77% decrease that took it down a peg from last year's second place finish.

Gas–oil

Mobil's extensive editorial campaign helped it keep a substantial lead among newspaper advertisers. Its total

spending was $6.4 million, making 1984 the third straight year in which its print spending was slightly reduced. Second was Atlantic Richfield, which sharply reversed its own downward trend by spending $2.8 million, an increase of 810%. Exxon was third with $1.7 million in expenditures, a slight decrease from 1983.

Insurance–Life

Life insurance companies continued to be big advertisers in the newspapers in 1984. The top three spenders, Physicians Mutual, New York Life, and Gerber Life, respectively, were the same as in 1983. Physicians increased its spending by $500,000, to $2.2 million, while New York spent $400,000 more, for a total of $1.9 million. Gerber, on the other hand, reduced its spending by about $50,000, to $1.2 million.

Liquors

Seagram moved boldly back into the lead among liquor brands, with a 276% increase in its print spending. Seagram spent $5.7 million to appeal to newspaper readers, which continued its rollercoaster ride through this medium in the 1980s. Seagram has alternately raised and dropped its print budget dramatically every year since 1979.

In second place was J&B, with expenditures of $2.5 million. This resumed a five-year rise in print spending broken only by a sharp dip in 1983. Third was Ballantine's scotch, with $1.6 million, continuing a series of large increases started in 1982.

Two of the perennial leading spenders, Schenley and Wild Turkey, made major cuts in their paper spending in 1984. Schenley spent over $1 million less than in 1983, while Wild Turkey spent $500,000 less.

Phonographs–records–tapes

Columbia and RCA traded places for the second straight year among the leading print advertisers in this field, with Columbia taking over the top spot again on the strength of a 29% increase in spending. Columbia's total of $10.3 million held a wide lead over RCA's $6.7 million, which was a decrease of 23% for the 1983 leader.

In third place for the third straight year was Sony, despite a cut in spending of 64%, down to $2.3 million.

Soaps–cleansers–polishers

This was a field that really took off in 1984, as the leading brands made a big push to attract buyers through the newspapers. The number one spender was Texize. It led for the second year in a row with a total expenditure of $1.4 million — an increase of 209% over 1983.

Yes liquid detergent and Morton water softener salt, the number two and three spenders, trailed far behind but had increases that were no less dramatic. Yes spent $600,000, an increase of 3,429%, while Morton spent $545,000, an increase of 2,080%.

Steamship lines

Sitmar Cruises steamed into first place in 1984, in a field that has seen increased newspaper spending by most of its leaders throughout the '80s. Sitmar spent $9.7 million trying to lure the more leisurely traveler away from the airlines through the print medium — an increase of 27%. Cunard was second for the second year in a row, despite a $4.6 million increase that brought its total expenditures up to $9.5 million. Royal Caribbean Cruise Line was third, with $6.9 million for print ads — an increase of 50%.

Holland American, the leading spender for the previous two years, moved in the opposite direction of the 1984 leaders. It spent $5.6 million, which was a reduction of 30%.

Tours–travel service

American Express continued to be a runaway leader in this field, which was more than ever a major source of newspaper advertising dollars in 1984. After a reduction in spending of $1.3 million in 1983, American Express increased its spending by 49% last year, up to a total of $10.8 million. In second place, with a total of $7.9 million, was Liberty Travel Service, spending 47% more than it had in 1983. Third was Pleasant Hawaiian, with $6.1 million, up 9%.

Toys–games (excluding video games)

Toy and game manufacturers pushed many of their products with new vigor in the papers, as the bottom fell out of the video game market. The chief example of this was Mattel, which cut its video game advertisements to a small fraction of what they were in 1982-83, and increased its print budget for other advertisements by 4,338% — from $40,000 to $1.7 million.

In second place was the country's new game craze and one of the leading Canadian exports to America, Trivial Pursuits. The big new kid in the toy world started off its newspaper advertising with a significant $1.2 million.

Circus World was a distant third, debuting in print with $85,000.

Video games

Video games fell into very fine type in 1984 newspapers. The electronic playthings had an enormous boom year in 1982 and, despite a sharp leveling off, still constituted a major source of advertising dollars in 1983.

But in 1984 the bottom dropped out. Mattel Intellivison was the leader with only $82,000 — as opposed to the $4.2 million that Atari spent the year before. Atari itself dropped to third, with expenditures of $35,000 — a decrease of some 99%. The number two spender was Wico Joystick, which cut its spending by 93%, down to $41,000.

Wearing apparel

Ralph Lauren was the leader for the third year in a row, spending $2.1 million to attract purveyors of glad rags. This was only a slight decrease from 1983, in a generally reduced field. Hush Puppies, spending $1.4 million, was the number two spender for the second straight year but cut its spending by 28%. Jordache got back into the top three after a year's absence, despite a reduction in its print budget of 32%. Maidenform, which was number three in 1983, reduced its spending by almost $1 million.

Kevin Baker

TOP 100 NATIONAL NEWSPAPER ADVERTISERS — 1984

Rank		1984 Investments	1983 Investments
1.	General Motors Corp.	$109,359,000	$ 88,579,000
2.	R. J. Reynolds Industries, Inc.	101,990,000	112,343,000
3.	Philip Morris Inc.	69,023,000	65,272,000
4.	Ford Motor Co.	62,063,000	49,603,000
5.	American Telephone & Telegraph Co.	58,200,000	71,995,000
6.	RCA Corp.	36,962,000	31,716,000
7.	International Business Machines Corp.	36,036,000	11,720,000
8.	Chrysler Corp.	34,962,000	31,846,000
9.	Delta Air Lines, Inc.	26,331,000	31,810,000
10.	Batus Inc.	25,317,000	27,803,000
11.	CBS Inc.	21,519,000	15,829,000
12.	Trans World Airlines, Inc.	21,436,000	21,925,000
13.	Eastern Air Lines, Inc.	18,654,000	22,461,000
14.	Texas Air Corp.	17,636,000	12,390,000
15.	Loews Corp.	17,095,000	22,533,000
16.	U.S. Government	16,797,000	11,548,000
17.	American Broadcasting Companies, Inc.	16,155,000	10,304,000
18.	General Electric Co.	14,984,000	12,220,000
19.	Toyota Motor Sales, U.S.A., Inc.	14,913,000	12,571,000
20.	AMR Corp.	13,496,000	12,790,000
21.	Time, Inc.	13,319,000	11,428,000
22.	Nissan Motor Co., Ltd.	13,170,000	9,444,000
23.	Grandmet USA, Inc.	12,842,000	4,375,000
24.	Beatrice Companies, Inc.	12,340,000	5,683,000
25.	NYNEX	11,781,000	14,803,000
26.	Hyatt Corp.	11,762,000	——
27.	GTE Corp.	11,631,000	12,414,000
28.	American Express Co.	11,481,000	12,337,000
29.	Pan American World Airways, Inc.	11,395,000	19,202,000
30.	Norwegian Caribbean Lines	11,112,000	4,715,000
31.	Ameritech Corp.	11,110,000	8,067,000
32.	Volkswagen of America, Inc.	11,051,000	9,947,000
33.	Northwest Orient Airlines	10,265,000	9,147,000
34.	Cunard Line Ltd.	9,839,000	7,469,000
35.	Epson America Inc.	9,761,000	7,272,000
36.	Sitmar Cruises	9,731,000	7,403,000
37.	Seagram, Joseph E., & Sons, Inc.	9,426,000	8,477,000
38.	Republic Airlines, Inc.	9,165,000	11,660,000
39.	American Honda Motor Co., Inc.	9,001,000	8,059,000
40.	People Express Airlines	8,953,000	2,180,000
41.	Xerox Corp.	8,595,000	13,824,000
42.	Apple Computer, Inc.	8,026,000	5,231,000
43.	Warner Communications, Inc.	7,912,000	15,718,000
44.	Liberty Travel, Inc.	7,880,000	5,361,000
45.	Gencorp Inc.	7,716,000	5,327,000
46.	American Motors Corp.	7,572,000	8,315,000
47.	United Technologies Corp.	7,283,000	4,669,000
48.	Bellsouth Corp.	7,260,000	4,635,000
49.	Dart & Kraft, Inc.	6,919,000	7,067,000
50.	Anheuser-Busch Companies, Inc.	6,868,000	4,158,000
51.	Royal Caribbean Cruise Line, Inc.	$ 6,860,000	$ 4,580,000
52.	Mobil Corporation	6,757,000	7,045,000
53.	Coca-Cola Company, The	6,747,000	6,037,000
54.	Princess Cruises	6,639,000	3,801,000
55.	Procter & Gamble Co., The	6,547,000	9,830,000
56.	Mercedes-Benz of North America, Inc.	6,545,000	6,595,000
57.	Bell Atlantic Corp.	6,402,000	5,243,000
58.	Jaguar Cars Inc.	6,353,000	5,895,000
59.	USAIR Group, Inc.	6,349,000	6,720,000
60.	Holland America Cruises	6,276,000	7,929,000
61.	UAL, Inc.	6,112,000	5,432,000
62.	B.M.W. of North America Inc.	6,109,000	4,761,000
63.	Pleasant Hawaiian Holidays	6,101,000	5,572,000
64.	Volvo of America Corp.	5,599,000	3,767,000
65.	Southwestern Bell Corp.	5,798,000	5,284,000
66.	Hormel, Geo. A., & Co.	5,778,000	4,389,000
67.	Piedmont Aviation, Inc.	5,686,000	4,340,000
68.	Nabisco Brands, Inc.	5,466,000	6,174,000
69.	Campbell Soup Co.	5,401,000	4,641,000
70.	Midway Airlines, Inc.	5,365,000	2,212,000
71.	Doubleday & Company, Inc.	5,263,000	4,658,000
72.	Club Med Sales, Inc.	5,203,000	4,258,000
73.	Seiko Corp. of America	5,181,000	8,733,000
74.	Pacific Telesis	5,142,000	3,577,000
75.	Carnival Cruise Lines	5,129,000	7,191,000
76.	Knight-Ridder Newspapers, Inc.	5,128,000	119,000
77.	Pepsico, Inc.	5,036,000	6,002,000
78.	American Brands, Inc.	4,994,000	5,815,000
79.	US West	4,981,000	3,443,000
80.	Sony Corp. of America	4,919,000	11,620,000
81.	Consolidated Foods Corp.	4,812,000	2,834,000
82.	Brown-Forman Distillers Corp.	4,791,000	3,841,000
83.	Bahama Cruise Line	4,683,000	1,933,000
84.	Hewlett-Packard Co.	4,647,000	4,110,000
85.	Subaru of America, Inc.	4,557,000	2,692,000
86.	Motorola, Inc.	4,556,000	781,000
87.	Eastman Kodak Co.	4,523,000	5,163,000
88.	World Airways, Inc.	4,507,000	1,777,000
89.	International Thomson Communications Inc.	4,440,000	2,456,000
90.	Carefree David Vacations	4,394,000	4,481,000
91.	Newhouse Publications	4,366,000	2,834,000
92.	New York Times, Inc.	4,314,000	3,046,000
93.	Saab-Scania of America, Inc.	4,239,000	3,829,000
94.	Southwest Airlines, Co.	4,109,000	4,878,000
95.	Air Canada	4,080,000	2,856,000
96.	Greyhound Corp., The	4,057,000	8,926,000
97.	ITT Corp.	4,042,000	3,162,000
98.	General Foods Corp.	4,017,000	4,201,000
99.	Transamerica Corp.	4,014,000	3,142,000
100.	NEC Electronics Inc.	3,952,000	1,316,000
	Total top 100 newspaper advertisers	**$1,289,068,000**	

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Air Conditioning					
Carrier	$2,697,000	$1,371,000	$1,474,000	$1,170,000	$837,000
Bryant	704,000	349,000	309,000	529,000	88,000
Friedrich	536,000	748,000	476,000	493,000	445,000
Aircraft & equipment					
McDonnell Douglas	550,000	539,000	263,000	182,000	117,000
Grumman	501,000	227,000	19,000	370,000	32,000
Hughes Aircraft	205,000	—	80,000	—	—
Airlines					
Delta	26,273,000	31,810,000	24,665,000	21,653,000	20,410,000
TWA	21,424,000	21,852,000	19,776,000	17,354,000	17,440,000
Eastern	16,611,000	22,461,000	21,625,000	23,670,000	20,161,000
Aluminum-paper products					
Banner toilet tissue	411,000	273,000	—	—	—
Luvs	228,000	417,000	270,000	140,000	328,000
Ziploc bags	226,000	624,000	473,000	535,000	342,000
Amusements					
New Orleans World's Fair	901,000	—	—	—	—
Disney	866,000	977,000	552,000	602,000	360,000
Touchstone Films	547,000	—	—	—	—
Auto lease-rental					
Hertz	7,524,000	8,429,000	4,682,000	5,053,000	4,550,000
Ford Dealers' Red Carpet Leases	5,188,000	866,000	376,000	—	—
Avis	5,053,000	3,655,000	2,245,000	3,609,000	1,320,000
Auto parts-accessories					
Delco	3,620,000	2,556,000	950,000	215,000	71,000
Monroe	337,000	430,000	579,000	30,000	33,000
Motorcraft	332,000	409,094	953,000	511,000	343,000
Automobiles					
Chevrolet	35,305,000	21,992,000	28,754,000	27,515,000	18,780,000
Ford	31,194,000	28,967,000	28,015,000	28,820,000	15,199,000
Cadillac	21,740,000	22,780,000	16,752,000	13,522,000	9,621,000
Bakery goods					
Nabisco	2,189,000	3,308,000	2,932,000	2,678,000	418,000
Grandma's	825,000	82,000	27,000	—	10,000
Pepperidge Farm	571,000	751,000	1,069,000	1,288,000	651,000
Beers					
Budweiser	2,246,000	2,242,000	1,929,000	939,000	258,000
LA (Anheuser-Busch)	1,618,000	—	—	—	—
Miller	1,279,000	1,556,000	490,000	173,000	98,000
Books					
Book-of-the-Month	2,897,000	2,546,000	2,387,000	2,191,000	1,748,000
Times books	2,521,000	2,684,000	963,000	144,000	558,000
Doubleday	1,898,000	2,147,000	1,693,000	1,542,000	1,280,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Bus lines					
Greyhound	$3,193,000	$5,824,000	$1,209,000	$908,000	$838,000
Trailways	1,474,000	1,235,000	896,000	652,000	620,000
Blue Bird Coach	716,000	585,000	441,000	201,000	111,000
Cameras-photo supplies					
Kodak	3,595,000	5,105,000	3,650,000	2,401,000	3,180,000
Canon	2,046,000	428,000	356,000	773,000	661,000
RCA Video Camera	1,659,000	16,000	—	120,000	—
Cargo airlines					
Federal Express	3,587,000	896,000	864,000	937,000	413,000
Purolator Courier	553,000	115,000	—	59,000	—
Quick International Courier	97,000	35,000	—	—	—
Cereals					
Kellogg's	1,232,000	2,395,000	2,044,000	2,457,000	3,263,000
Post	935,000	296,000	443,000	151,000	269,000
General Mills	613,000	1,746,000	420,000	457,000	335,000
Cigarettes					
Marlboro	29,328,000	11,062,000	13,207,000	16,731,000	17,328,000
Merit	18,809,000	9,286,000	23,681,000	38,133,000	29,141,000
Vantage	17,754,000	10,953,000	9,978,000	28,514,000	27,196,000
Cigars					
Macanudo	86,000	111,000	—	—	32,000
Don Diego	84,000	38,000	21,000	63,000	23,000
H. Upmann	70,000	38,000	14,000	38,000	34,000
Coffee					
Sanka	750,000	895,000	655,000	508,000	946,000
Chock Full o'Nuts	465,000	39,000	254,000	379,000	165,000
Nescafe	192,000	820,000	668,000	593,000	634,000
Cold, cough, & sinus remedies					
Tnaminic	474,000	1,175,000	126,000	36,000	—
Luden's Cough Drops	223,000	60,000	—	—	—
Afrin Nasal Spray	179,000	35,000	—	—	—
Coricidin D	179,000	35,000	—	—	—
Computers					
IBM	33,014,000	7,786,000	4,630,000	1,900,000	1,616,000
Epson	9,744,000	7,215,000	146,000	—	—
Hewlett-Packard	4,630,000	3,871,000	1,185,000	278,000	117,000
Condiments					
Heinz	582,000	904,000	758,000	677,000	551,000
Vlasic pickles	463,000	105,000	33,000	188,000	—
Ragu	413,000	325,000	771,000	237,000	372,000
Confectionery-snacks					
Nabisco	654,000	320,000	166,000	407,000	162,000
Nestle	643,000	—	51,000	422,000	307,000
Peter Paul Cadbury	338,000	411,000	273,000	273,000	69,000

	1984	1983	1982	1981	1980
Cosmetics					
Tova 9	$1,878,000	$1,939,000	$1,040,000	$ —	$ —
Estee Lauder	631,000	679,000	432,000	330,000	476,000
Lancome	527,000	590,000	103,000	—	14,000
Couponers					
Vlassic Inserts	99,256,000	61,735,000	38,951,000	23,439,000	13,456,000
Newspaper Coop Couponing/BFD Color Inserts (Market Corp. of America)	79,569,000	36,230,000	40,751,000	3,546,000	2,677,000
Blair Inserts	74,873,000	56,738,000	34,233,000	21,748,000	11,666,000
Dairy products					
Kraft	1,448,000	1,125,000	1,841,000	1,221,000	1,119,000
Light n' Lively	734,000	348,000	252,000	478,000	563,000
County Line	346,000	263,000	97,000	63,000	42,000
Dental supplies-mouthwashes					
Colgate	117,000	536,000	151,000	1,617,000	324,000
Denturite Denture Cushion	38,000	—	—	—	—
Listermint	38,000	151,000	23,000	3,000	131,000
Farm & garden					
Snapper	3,835,000	3,799,000	2,667,000	2,156,000	1,815,000
Toro	3,007,000	2,887,000	2,387,000	1,843,000	1,950,000
Lawnboy	1,446,000	980,000	648,000	543,000	524,000
Feminine hygienic products					
Always	1,033,000	68,000	—	—	—
Kotex	266,000	42,000	304,000	248,000	95,000
Sure & Natural	212,000	207,000	19,000	194,000	591,000
Floor coverings					
Armstrong	777,000	959,000	1,640,000	1,290,000	698,000
Congoleum	366,000	653,000	495,000	78,000	372,000
Dobson	364,000	341,000	185,000	53,000	39,000
Fruits-vegetables					
Birds Eye	446,000	313,000	325,000	411,000	180,000
French's Potatoes	423,000	294,000	57,000	107,000	77,000
Sun	258,000	219,000	180,000	92,000	124,000
Fruit & vegetable juices					
Welch's	934,000	180,000	228,000	149,000	89,000
Minute Maid	504,000	810,000	926,000	835,000	759,000
Tropicana	496,000	974,000	1,010,000	515,000	210,000
Furniture					
La-Z-Boy	1,635,000	620,000	183,000	119,000	422,000
Ethan Allen	456,000	212,000	247,000	303,000	45,000
Sealy	452,000	436,000	263,000	257,000	282,000
Gas-oil					
Mobil	6,448,000	6,475,000	7,226,000	8,105,000	5,631,000
Atlantic Richfield	2,848,000	313,000	532,000	1,127,000	1,423,000
Exxon	1,711,000	1,808,000	1,304,000	1,110,000	2,617,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Headache remedies-sedatives					
Nuprin	$649,000	$ —	$ —	$ —	$ —
Cosprin	573,000	—	—	—	—
Encaprin	544,000	—	—	—	—
Heating-plumbing equipment					
Carrier	1,098,000	763,000	1,093,000	460,000	242,000
Bryant	679,000	456,000	155,000	76,000	—
Amana	439,000	309,000	90,000	139,000	24,000
Home building materials-tools					
Shopsmith	1,593,000	1,504,000	869,000	711,000	505,000
Andersen	864,000	590,000	479,000	397,000	252,000
Owens Corning	755,000	453,000	1,628,000	1,375,000	533,000
Household furnishings					
Del Mar Window Coverings	3,200,000	462,000	241,000	755,000	15,000
Lenox	3,107,000	585,000	176,000	156,000	129,000
Corning	1,129,000	50,000	31,000	142,000	12,000
Industrial materials-machinery					
General Electric	1,829,000	621,000	109,000	189,000	138,000
United Technologies	1,279,000	1,284,000	1,154,000	741,000	790,000
Northrup	810,000	424,000	311,000	197,000	125,000
Insecticides-disinfectants					
Roach Prufe	824,000	1,065,000	904,000	432,000	1,202,000
Raid	445,000	531,000	329,000	1,040,000	556,000
Airwick	395,000	357,000	—	42,000	—
Insurance — Life					
Physicians Mutual	2,219,000	1,705,000	1,657,000	1,184,000	841,000
New York Life	1,892,000	1,463,000	2,267,000	1,405,000	1,214,000
Gerber Life	1,197,000	1,244,000	761,000	451,000	1,199,000
Jewelry — Watches					
Seiko	5,163,000	1,252,000	1,299,000	1,698,000	632,000
Timex	1,157,000	3,296,000	2,292,000	1,386,000	2,104,000
Rolex	831,000	778,000	20,000	320,000	—
Jewelry — Other					
Van Pler V Tissany	1,536,000	120,000	—	—	—
Oneida Silverware	343,000	309,000	592,000	188,000	110,000
European Jewelers of 47th St.	342,000	—	—	—	—
Liquors					
Seagram's	5,694,000	1,516,000	3,418,000	2,395,000	4,397,000
J & B	2,499,000	940,000	1,172,000	794,000	666,000
Ballantine's	1,623,000	1,149,000	253,000	433,000	328,000
Lotteries					
District of Columbia	920,000	202,000	—	—	—
Massachusetts State	858,000	437,000	465,000	553,000	513,000
New York State	702,000	793,000	923,000	900,000	2,245,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Magazines					
Woman's World	$2,524,000	$569,000	$1,246,000	$712,000	$ 18,000
Fortune	1,870,000	880,000	594,000	390,000	301,000
TV Guide	1,672,000	4,362,000	1,409,000	677,000	672,000
Mail Order					
Franklin Mint	6,654,000	8,340,000	8,678,000	9,041,000	8,270,000
Shopping Mart	5,335,000	5,253,000	3,344,000	2,083,000	1,555,000
Fingerhut Corp.	2,923,000	1,123,000	544,000	81,000	141,000
Meats-fish-poultry					
Hormel	5,122,000	4,299,000	3,203,000	3,328,000	2,208,000
Wilson	1,394,000	1,092,000	1,345,000	434,000	199,000
Mrs. Paul's	873,000	591,000	206,000	83,000	222,000
Motorcycles					
Suzuki	987,000	1,915,000	920,000	118,000	—
Yamaha	533,000	2,445,000	1,900,000	316,000	137,000
Honda	451,000	1,191,000	1,797,000	419,000	36,000
Newspapers					
Investors Daily	1,740,000	—	—	—	—
New York Times	1,249,000	—	44,000	9,940	6,070
USA Today	1,190,000	1,717,000	835,000	—	—
Office equipment (minus computers)					
Xerox	7,819,000	12,892,000	5,728,000	4,956,000	3,103,000
Canon	1,575,000	163,000	350,000	219,000	—
IBM	933,000	3,781,000	2,598,000	729,000	1,227,000
Paints					
Sherwin Williams	891,000	647,000	353,000	457,000	204,000
Benjamin Moore	579,000	311,000	277,000	317,000	279,000
Fuller O'Brien	304,000	137,000	205,000	157,000	37,000
Perfumes-toilet water					
Guerlain	560,000	714,000	—	—	218,000
Estée Lauder	426,000	568,000	602,000	262,000	196,000
Paloma Picasso	120,000	—	—	—	—
Pet foods					
Alpo	1,444,000	776,000	247,000	116,000	233,000
Purina	1,030,000	1,565,000	2,163,000	974,000	1,468,000
Gaines	392,000	524,000	239,000	—	479,000
Pet supplies					
Tetras Aquarium Products	907,000	1,046,000	321,000	118,000	70,000
Jonny Cat Cat Litter	306,000	139,000	110,000	66,000	59,000
Filaribits	281,000	238,000	99,000	186,000	153,000
Phonographs-records-tapes					
Columbia	10,274,000	7,959,000	7,153,000	5,994,000	6,186,000
RCA	6,712,000	8,723,000	6,996,000	5,480,000	265,000
Sony	2,294,000	6,397,000	3,910,000	3,509,000	3,112,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Prepared dishes					
On-Cor Frozen Entrees	$ 902,000	$ 299,000	$ 95,000	$ 38,000	$ —
Banquet	673,000	237,000	173,000	176,000	10,000
Van de kamps	447,000	110,000	186,000	49,000	19,000
Public utilities					
AT&T	47,865,000	23,610,000	4,426,000	1,280,000	2,336,000
General Telephone & Electronics	11,299,000	4,655,000	1,258,000	1,508,000	912,000
New York Telephone	6,573,000	7,733,000	6,565,000	2,105,000	3,229,000
Radio-tv sets					
RCA	6,391,000	3,936,000	2,991,000	3,587,000	3,175,000
Zenith	1,602,000	963,000	865,000	1,910,000	1,633,000
Sony	1,506,000	994,000	226,000	1,254,000	1,866,000
Radio-tv stations					
ABC	12,144,000	10,228,000	10,241,000	10,240,000	11,808,000
NBC	10,067,000	7,816,000	11,383,000	13,727,000	15,488,000
CBS	9,649,000	6,695,000	8,424,000	8,658,000	7,870,000
Railroads					
Amtrak	9,505,000	5,979,000	5,358,000	3,741,000	2,115,000
Metrorail	364,000	138,000	90,000	41,000	—
CSX	333,000	169,000	297,000	96,000	30,000
Real estate					
Palm Valley Country Club	1,138,000	274,,000	—	—	—
Admiral Walk (Edgewater, NJ)	986,000	738,000	536,000	31,000	—
U.S. Department of Housing & Urban Development	841,000	177,000	127,000	63,000	470,000
Refrigerators-freezers					
GE	1,047,000	957,000	46,000	240,000	68,000
Whirlpool	267,000	203,000	165,000	205,000	268,000
Admiral	122,000	106,000	33,000	—	24,000
Shaving equipment					
Gillette	742,000	690,000	2,069,000	1,297,000	341,000
Clinique	67,000	62,000	—	—	—
Remington	47,000	32,000	—	—	—
Shortenings-oils-margerines					
Imperial	881,000	566,000	482,000	349,000	204,000
Mazola	633,000	457,000	273,000	351,000	170,000
Fleischmann's	328,000	220,000	642,000	416,000	397,000
Soaps-bath powders-deodorants					
Neutrogena	744,000	418,000	—	—	—
Affinity	606,000	—	—	—	—
Jergens	155,000	—	—	175,000	—

	1984	1983	1982	1981	1980
Soaps-cleansers-polishes					
Texize	$ 1,380,000	$ 446,000	$ 42,000	$ 51,000	$1,433,000
Yes liquid detergent	600,000	17,000	19,000	411,000	80,000
Morton Water Softener Salt	545,000	25,000	112,000	13,000	44,000
Soft drinks					
Coca-Cola	3,893,000	4,267,000	2,535,000	2,191,000	1,204,000
Pepsi-Cola	3,268,000	5,198,000	2,410,000	1,659,000	917,000
Seven-Up	1,149,000	1,760,000	684,000	1,087,000	1,993,000
Soups					
Campbell's	960,000	80,000	696,000	1,442,000	592,000
Progresso	89,000	169,000	71,000	66,000	92,000
Mrs. Grass	81,000	104,000	141,000	248,000	17,000
Steamship lines					
Sitmar Cruises	9,731,000	7,403,000	5,994,000	3,107,000	1,840,000
Cunard	9,519,000	4,947,000	5,232,000	3,925,000	3,580,000
Royal Caribbean Cruise Line	6,860,000	4,580,000	2,577,000	3,168,000	2,420,000
Stoves-ranges-dishwashers					
Kitchen Aid	1,751,000	766,000	1,012,000	1,041,000	406,000
GE	1,455,000	2,182,000	655,000	394,000	364,000
Sharp Microwave Oven	867,000	881,000	595,000	198,000	106,000
Sugars-syrups					
Mrs. Butterworth's	253,000	218,000	29,000	74,000	—
Dixie Crystals	193,000	273,000	367,000	311,000	312,000
Imperial Sugar	98,000	123,000	59,000	28,000	56,000
Tobacco-smoking accessories					
Skoal	320,000	1,515,000	—	—	—
Borkum Riff	304,000	308,000	—	64,000	50,000
Captain Black	134,000	84,000	100,000	437,000	641,000
Toiletries-hair products (men)					
Aramis	446,000	643,000	530,000	101,000	376,000
Clinique	389,000	87,000	—	153,000	123,000
Ralph Lauren	206,000	37,000	31,000	202,000	365,000
Tours-travel service					
American Express	10,793,000	7,226,000	8,557,000	5,059,000	2,168,000
Liberty Travel Service	7,872,000	5,356,000	3,853,000	3,312,000	2,155,000
Pleasant Hawaiian	6,093,000	5,572,000	2,334,000	1,183,000	1,507,000
Toys-games					
Mattel*	1,775,000	40,000	1,607,000	2,000,000	722,000
Trivial Pursuits	1,211,000	—	—	—	—
Circus World	85,000	—	—	—	—
*Less video games					
Trucks-campers-vans					
Toyota	4,583,000	1,476,000	1,561,000	1,399,000	218,000
Ford	3,328,000	2,747,000	3,578,000	959,000	1,702,000
Chevrolet	2,630,000	1,481,000	1,267,000	1,966,000	1,215,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1984	1983	1982	1981	1980
Video games					
Mattel Intellivision	$ 82,000	$ 674,000	$3,298,000	$ 186,000	$ —
Wico Joystick	41,000	581,000	266,000	—	—
Atari	35,000	4,224,000	6,830,000	1,361,000	103,000
Vitamins/tonics/reducing aids					
Nutrition Headquarters	2,931,000	2,657,000	2,156,000	1,695,000	1,634,000
Metabolite 2050	1,606,000	393,000	—	—	—
Mannan Trim diet tablets	1,450,000	1,614,000	416,000	—	—
Washers/dryers					
Whirlpool	270,000	407,000	318,000	248,000	353,000
G.E.	248,000	543,000	—	—	71,000
Amana	68,000	29,000	23,000	—	—
Wearing apparel					
Ralph Lauren	2,079,000	2,174,000	1,747,000	843,000	304,000
Hush Puppies	1,355,000	1,876,000	1,290,000	1,636,000	964,000
Jordache	1,150,000	1,679,000	1,326,000	1,036,000	866,000
Wines					
Kobrand	757,000	475,000	60,000	11,000	—
Freixenet	590,000	643,000	70,000	18,000	—
Gallo	456,000	113,000	457,000	65,000	345,000

Estimates prepared by Media Records in 125 markets representing 82% of U.S. total

NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS, 1984-1983

Classification	1984 (thousands)	1983 (thousands)	G or L (percent)
GENERAL			
Alcoholic Beverages	$ 105,292.	$ 104,425.	+0.8%
Beers	19,424.	19,720.	−1.5
Wines	9,616.	9,728.	−1.2
Liquors	76,252.	74,977.	+1.7
Automotive			
Gasoline & Oil Companies	21,541.	18,770.	+14.8
Leasing & Rentals	61,005.	50,115.	+21.7
Parts, Accessories & Supplies	8,475.	13,326.	−36.4
Passenger Cars (New)	400,631.	326,332.	+22.8
Trucks, Trailers & Mobile Homes	26,840.	22,730.	+18.1
Automotive Not Elsewhere Classified	2,679.	2,088.	+28.3
Automotive Total	$ 521,171.	$ 433,361.	+20.3
Camera, Photo Supplies & Services	21,690.	21,434.	+1.2
Computers, Equipment & Services	122,427.	88,608.	+38.2
Educational	45,744.	42,198.	+8.4
Farm & Garden	32,885.	37,080.	−11.3

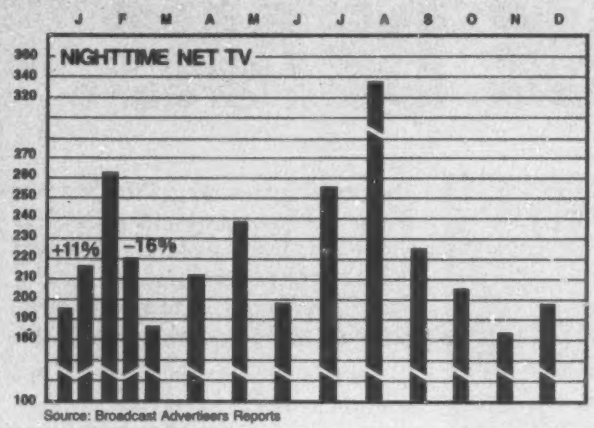
Classification	1984 (thousands)	1983 (thousands)	G or L (percent)
Foods	$ 166,292.	$ 187,098.	−11.1
Baby Foods	69.	359.	−80.7
Bakery Goods	14,875.	15,045.	−1.0
Baking Mixes, Flour & Ingredients	1,852.	2,265.	−18.2
Beverages	35,115.	41,651.	−15.7
Coffee	3,305.	4,709.	−29.8
Tea	1,481.	1,939.	−23.6
Fruit & Vegetable Juices	7,419.	8,023.	−7.5
Soft Drinks — Carbonated — Diet	6,435.	5,173.	+24.4
Soft Drinks — Carbonated — Non Diet	10,577.	16,902.	−37.4
Misc. Beverages	5,898.	4,905.	+20.2
Cereals	4,297.	6,821.	−37.0
Condiments	6,432.	9,731.	−33.9
Confectionery & Snacks	9,402.	10,863.	−13.4
Dairy Products	22,172.	22,881.	−3.1
Desserts & Dessert Ingredients	1,250.	1,239.	+0.9
Fruits & Vegetables	8,099.	7,041.	+15.0
Macaroni Products — Uncooked	1,470.	1,837.	−20.0
Meats, Fish & Poultry	25,476.	25,400.	+0.3
Prepared Dinners & Dishes	11,550.	10,544.	+9.5
Shortenings, Oils & Margarines	6,860.	10,488.	−34.6
Soups	1,652.	1,195.	+38.2

Classification	1984 (thousands)	1983 (thousands)	G or L (percent)
Sugars, Syrups & Jellies	$ 1,783.	$ 3,654.	−51.2
Misc. Foods	13,938.	16,084.	−13.3
Help Wanted	**104,618.**	**66,298.**	**+57.8**
Hotels & Resorts	**160,265.**	**150,288.**	**+6.6**
Hotels, Motels & Resorts	120,162.	104,072.	+15.5
Resort Area Development	40,103.	46,216.	−13.2
Household Furniture & Furnishings	**21,823.**	**17,245.**	**+26.5**
Floor Coverings	2,521.	3,683.	−31.6
Furnishings	14,774.	10,102.	+46.2
Furniture	4,528.	3,460.	+30.9
Household Heating & Home Heating Equipment	**14,341.**	**16,053.**	**−10.7**
Electric, Gas & Oil Suppliers	3,900.	5,806.	−32.8
Heating & Plumbing Equipment	10,441.	10,247.	+1.9
Household Supplies	**39,941.**	**41,723.**	**−4.3**
Aluminum & Paper Products	2,875.	7,120.	−59.6
Disinfectants & Insecticides	2,544.	4,673.	−45.6
Home Building Materials & Tools	12,407.	10,218.	+21.4
Paints, Wall Coverings & Other Finishes	4,530.	4,367.	+3.7
Soaps, Cleansers & Polishes	12,282.	10,187.	+20.6
Misc. Household Supplies	5,303.	5,158.	+2.8
Household Equipment & Appliances	**79,335.**	**77,017.**	**+3.0**
Air Conditioning	6,055.	5,016.	+20.7
Phonographs, Records, Tapes & Recorders	26,750.	29,051.	−7.9
Radio & TV Sets	12,911.	10,227.	+26.2
Ranges, Stoves & Dishwashers	6,758.	6,292.	+7.4
Refrigerators & Freezers	2,477.	2,475.	+0.1
Small Electrical Appliances	4,523.	5,309.	−14.8
Washers & Dryers	862.	2,152.	−59.9
Misc. Household Equipment & Appliances	18,999.	16,495.	+15.2
Industrial	**49,150.**	**38,520.**	**+27.6**
Aircraft & Equipment	3,119.	2,140.	+45.7
Industrial Area Development	6,199.	3,913.	+58.4
Office Equipment & Stationery Supplies	10,183.	7,968.	+27.8
Industrial Materials & Machinery	13,881.	10,228.	+30.8
Misc. Industrial	16,268.	14,271.	+14.0
Insurance	**53,234.**	**47,220.**	**+12.7**
Life, Health & Medical	45,529.	40,553.	+12.3
Fire, Casualty & Other	7,705.	6,667.	+15.6
Jewelry, Watches & Silverware	**13,256.**	**9,608.**	**+38.0**
Mail Order	**49,242.**	**64,464.**	**−23.6**
Medical Products & Drugs	**34,700.**	**33,710.**	**+2.9**
Cold, Cough & Sinus Remedies	2,568.	5,116.	−49.8
Digestive Aids & Laxatives	1,528.	1,101.	+38.8
Headache Remedies & Sedatives	3,803.	1,302.	+192.1
Vitamins, Tonics & Reducing Aids	21,788.	19,789.	+10.1
Medicated Skin Products	$ 742.	$ 1,412.	−47.5
Misc. Medical Products & Drugs	4,271.	4,990.	−14.4
Pets & Pet Supplies	**8,381.**	**10,149.**	**−17.4**
Pet Foods	6,019.	7,276.	−17.3
Pets & Pet Supplies	2,362.	2,873.	−17.8
Political	**19,171.**	**9,140.**	**+109.8**
Public Service Utilities & Communications	**174,593.**	**135,731.**	**+28.6**
Publishing & Media	**230,462.**	**209,147.**	**+10.2**
Books	37,287.	33,042.	+12.8
Magazines	28,901.	27,954.	+3.4
Newspapers	9,166.	7,166.	+27.9
Radio & TV Stations	155,108.	140,985.	+10.0
Real Estate	**48,273.**	**37,190.**	**+29.8**
Sporting & Leisure Time Equipment	**10,665.**	**18,225.**	**−41.5**
Sporting Goods	6,013.	8,481.	−29.1
Boats & Equipment	661.	583.	+13.4
Hobbies, Toys & Games	3,991.	9,161.	−56.4
Tobacco	**236,354.**	**256,766.**	**−7.9**
Cigars	530.	964.	−45.0
Cigarettes	234,502.	251,932.	−6.9
Tobacco & Smoking Accessories	1,322.	3,870.	−65.8
Toiletries & Toilet Goods	**21,624.**	**35,740.**	**−39.5**
Cosmetics, Make-Up & Manicure Products	7,998.	9,624.	−16.9
Dental Supplies & Mouthwashes	331.	2,307.	−85.7
Feminine Hygienic Products	2,349.	7,058.	−66.7
Men's Toiletries & Hair Products	2,145.	3,225.	−33.5
Men's & Women's Shaving Equipment	1,033.	1,024.	+0.9
Perfumes & Toilet Water	1,782.	2,978.	−40.2
Toilet Soaps, Bath Powders & Deodorants	2,119.	3,011.	−29.6
Women's Hair Products & Treatments	331.	887.	−62.7
Misc. Toiletries & Toilet Goods	3,536.	5,626.	−37.1
Transportation	**526,336.**	**470,363.**	**+11.9**
Airlines	264,223.	247,747.	+6.7
Domestic	165,648.	144,707.	+14.5
International	93,874.	99,872.	−6.0
Cargo	4,701.	3,168.	+48.4
Bus Lines	9,051.	10,817.	−16.3
Railroads	11,525.	8,856.	+30.1
Steamships	88,033.	76,681.	+14.8
Tours & Travel Service	147,031.	120,859.	+21.7
Misc. Transportation	6,473.	5,403.	+19.8
Wearing Apparel	**39,589.**	**49,529.**	**−20.1**
General Not Elsewhere Classified	**344,028.**	**260,062.**	**+32.3**
General Total	**$2,814,296.**	**$2,571,564.**	**+9.4**

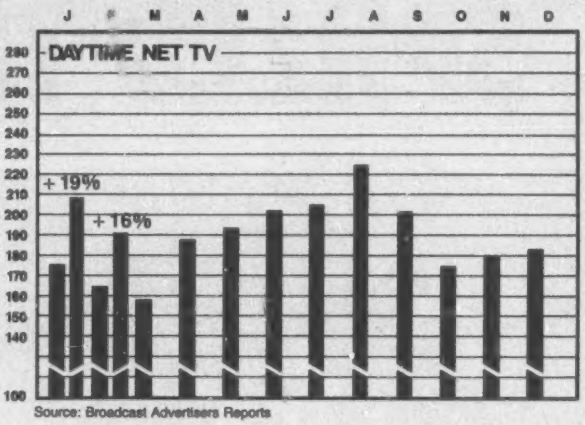
Classifications projected to U.S. totals by Media Records © 1984

MEDIA COST INDEX

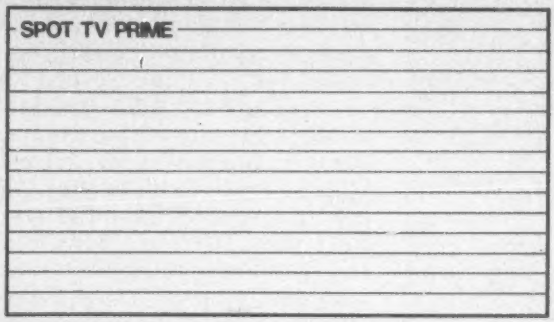
Black bars index for 1983; color bars 1984; base year 1977

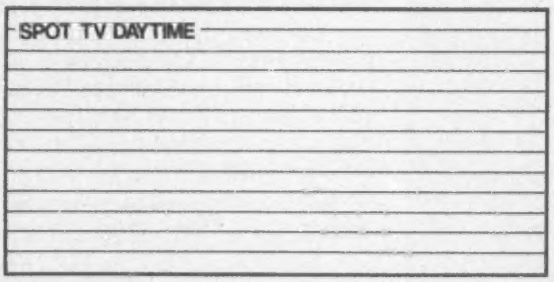


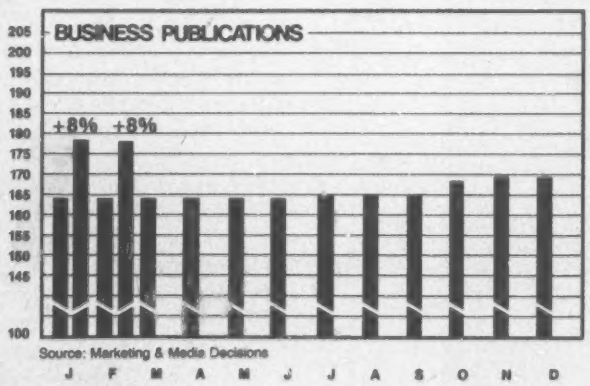
Source: Broadcast Advertisers Reports



Source: Broadcast Advertisers Reports







Source: Marketing & Media Decisions

J F M A M J J A S O N D

The February cost index shows a couple of interesting changes from the comparable periods in 1984. One was the 16% decrease in **nighttime network tv.** The reason: rates have settled back after a not-too-surprising jump of 34% for the year-ago month in 1984 caused by advertiser interest in buying against the Winter Olympics. The other was the increase of 6% reported for **spot radio** in the first quarter. Each quarter last year showed a double-digit increase over 1983.

Daytime network tv continued its first-quarter pattern of declines from the previous month, but the relative change over February 1984 (16%) is holding rather close to the January picture.

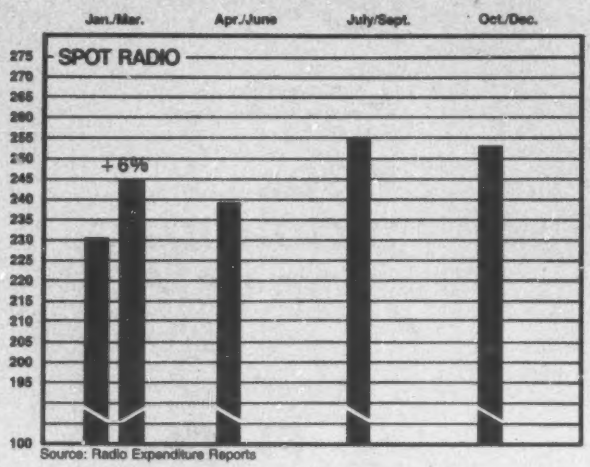
Print media, as is their wont, have settled in for the first quarter. **Outdoor,** indexed at 215, remains 7% ahead of last year. **Newspapers,** at 140, are down one point from January, but the relative change over 1984 remains at +7%. The **national Sunday magazines** held at +10% over the year-ago month. **Consumer magazines** report an 8% increase, down one point from January. **Business publications** have settled in at an index point of 178 (+8% over February 1984). Changes usually start to show at about mid-year.

As announced last month, the continuing index for **network radio** will be discontinued until comparable data are again available. This revision in compiling technique instituted by Broadcast Advertisers Reports (adding more networks to the statistical base) should add significantly to the value of the resulting cost-trend line.

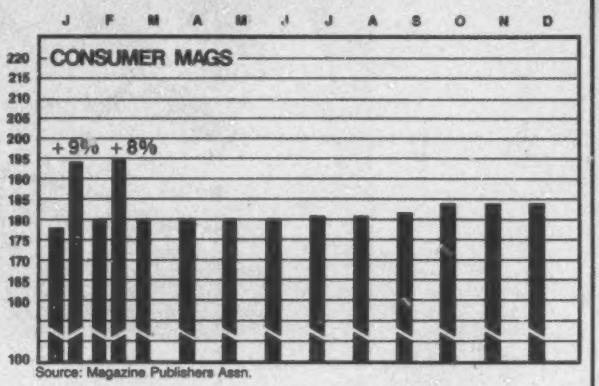
The long-awaited series of data to again establish a **spot tv** cost index has been delayed by a mechanical problem, but, hopefully, we will soon be adding bars to the charts reserved for spot tv.

MEDIA COST INDEX (continued)

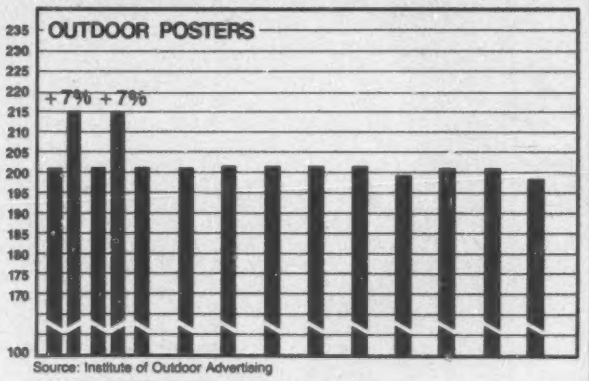
Black bars index for 1983; color bars 1984; base year 1977



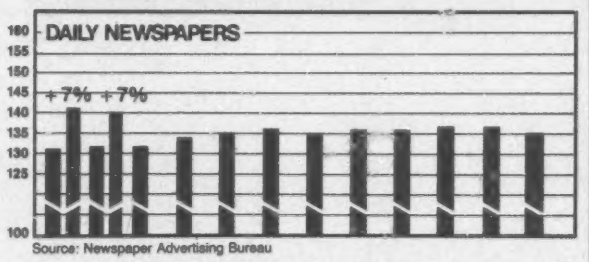
Source: Radio Expenditure Reports



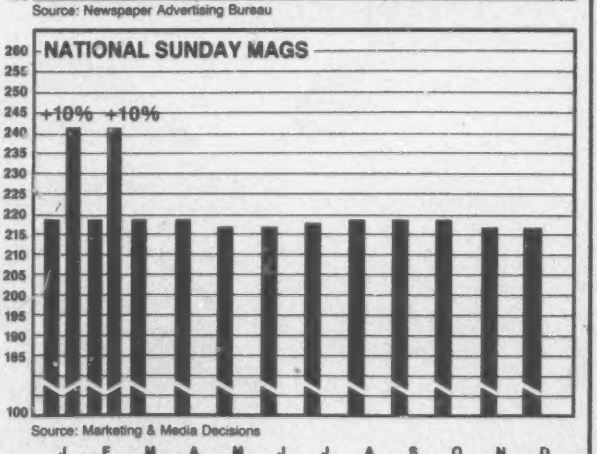
Source: Magazine Publishers Assn.



Source: Institute of Outdoor Advertising



Source: Newspaper Advertising Bureau



Source: Marketing & Media Decisions

The Media Cost Index reflects trends extracted from available sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled.

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Spot TV—prime and daytime—Cost per 30-second spot, Monday-Sunday from BAR's Spot TV Service.

Consumer Magazine estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in 40 national supplements.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per agate line of a sample of 788 newspapers weighted to represent the universe.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.

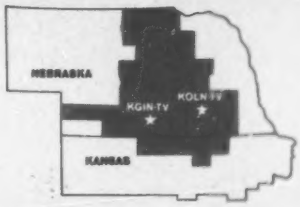
Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

How to read: Media Cost Index reflects latest available costs compared with base year 1977. Percent change shows rate of change from the same month in previous year.

No doubt about it!

KOLN-TV/KGIN-TV is one of the best TV buys in the top 100 markets.



SECOND IN THE NATION
Prime Time 34%

FOURTH IN THE NATION
Total Day 33%

KOLN-TV/KGIN-TV also dominates early and late news:

6 p.m., Monday-Friday ..... 46 share and a 26 rating
10 p.m., Monday-Friday ..... 45 share and a 26 rating

Get all the facts and figures about KOLN-TV/KGIN-TV and the Lincoln-Hastings-Kearney market from your Harrington, Righter & Parsons representative.

Television/Radio Age and Arbitron, November, 1984.

A Fetzer Station

KOLN-TV/KGIN-TV
Channel 10 (CBS) A CBS Affiliate Channel 11
LINCOLN, NEBRASKA 1500 FT. TOWER / GRAND ISLAND, NEBRASKA 1099 FT. TOWER
Harrington, Righter & Parsons National Representatives

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WILSON: *Continued from page 94.*

Not all of Wilson's problems are of Pepsi's making. The company is burdened with an internal paperwork system that antedates Pepsi's acquisition of the company, about 15 years ago. For example, when a dealer buys a uniform, the salesman sends the order to a regional warehouse — rather than the plant — which may no longer have a record of the order. Mistakes in athletic goods, such as uniforms, are expensive: "If they come back in the wrong color," says one dealer, "the salesman has to eat them." As a result, he says, Wilson's staff has been reluctant to push for orders.

"We have identified the problem," says Lumley with some discomfort. The company has announced a new "management information system," in other words, a computer for order tracking and shipment consolidation. The order entry system should be functioning by the end of the year.

Meanwhile, other sporting goods companies have been exploiting a more effortless way to boost income: licensing. But Wilson seems to have assiduously ignored opportunities over the past five years. "They've missed the boat on so much," exclaims Carr. When running shoes took off several years ago, for example, Wilson plunged into an agreement with Bata, a large shoe manufacturer, ending a relationship with Converse at the same time. The venture was unsuccessful: Rather than develop a specific Wilson line with Bata, the company adopted the existing line, called "Wilson by Bata." The shoe line was abandoned in 1980, after disappointing sales of $16 million in the first year.

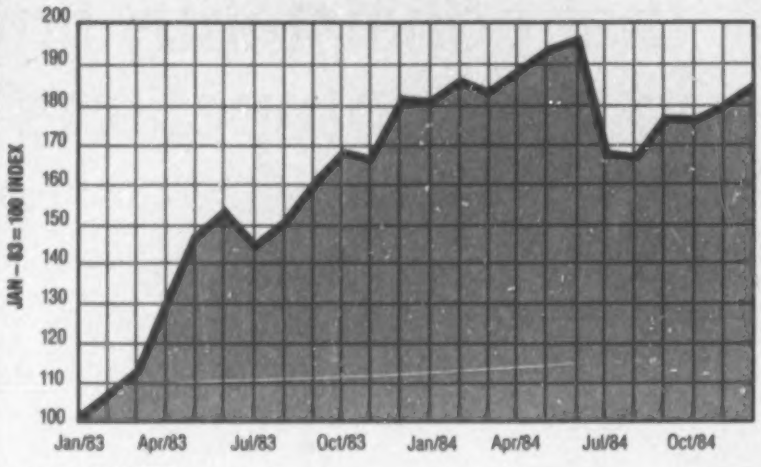
Home equipment, too, might have been a licensing opportunity, but may peak as a segment this year. Lumley notes that the company is looking at licensing opportunities, for shoes and equipment. "There's not a hell of a lot you can license that we don't make already," he says. Wilson's major licensee, an apparel line, contributes about $5 million to sales.

"If Wilson had any sense," offers an observer, "they'd shut everything down, license the name, and keep one employee to carry the $150 million to the bank." *Laura Konrad Jereski*

come from the machine-specific area: A brief glance at the computer market shows that many brands are not doing so well (Radio Shack, Atari, Commodore, DEC, Wang, Data General, etc.). Yet because growth has slowed down materially, all publication segments will have their victims, including the medical computer magazines, business, software, and dealer publications.

To halt an eroding market share against other media, some computer magazine publishers are participating in a syndicated research project to be conducted by SMRB this fall. It is hoped that this study will produce more cogent arguments for a concentration of ad spending in computer magazines. Echoes *PC World*'s associate publisher Woodard: "This type of research is direly needed." The SMRB computer study, which will provide such readership data as total audience, place or readership, duplication and product usage, will be based on 2,500 in-person interviews.

6. Audited Circulation Pattern
Selected Magazines 1983-1984



Source: 1985 ABC

To solve the problem of the consumer's intransigence with respect to the adoption of personal computers, the industry ought to band together in support of an advertising campaign to educate consumers about computer uses. This strategy would constitute a much wiser investment of mass-media dollars.

Michael Tchong

The market and the media for co-op advertising

The St. Petersburg Times and Evening Independent Co-Op Advertising Manager Mike Thompson and his staff keep retailers informed of your programs, help arrange tie-ins to national or regional campaigns and make sure your dealers know how to file their Co-Op forms. They help in preparing dealer listing ads, provide creative assistance... even organize meetings and workshops for you and your dealers. All in the spirit of co-operation.

The St. Petersburg-Tampa-Clearwater metro area will also cooperate with your sales plans. It's the largest metro market in Florida, second largest in the Southeast.

So call for our free guide to Co-Op... it'll show you exactly how to get some real cooperation from *the* media and *the* market.

St. Petersburg Times
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JAGUAR: *continued from page 79.*

sales potential is strongest. Jaguar is looking for an increased number of dealers in New York, Florida, San Francisco, Los Angeles, and Chicago, according to Dale.

Location of the new dealerships is being guided by a computerized map showing, where the highest income groups live, and which suburbs have the most high income groups. The computer also tells Jaguar how far customers need to drive to reach a dealership.

"I think that the car consumers wanted to love, but couldn't, is back."

The U.S. market is critical to Jaguar. More than 75% of the world's most luxurious autos are permanently parked in the U.S. And Jaguar is heavily dependent upon this market, which accounts for 55% of total sales. Other car companies, like Mercedes, believe that kind of reliance is too risky. Mercedes only sells 17% of its cars to the U.S. market, thus protecting itself from the ever-fluctuating dollar. Currently, Jaguar has been able to rack up large profits in part because of the strength of the U.S. dollar against the British pound. Last year, Jaguar saw a pre-tax profit of $104.2 million, compared with $57 million in the previous year. If the dollar declined, Jaguar would be faced with having to increase prices to maintain profit margins.

Aware of these pitfalls, Jaguar is looking to mine other markets as well. It has begun to increase its efforts in West Germany and did make some headway last year. Jaguar consumption, though on a tiny base, did increase some 71% over the previous year. The company recorded similarly good sales results in Australia and Canada in 1984.

"On looking back, it doesn't seem that anyone ever thought the company would actually close, even though at one time it was a matter of days," reflects Whitehead. If anything has helped Jaguar to pull through the crisis years, it's been the loyalty of buyers to the nameplate. Despite the hardships, Jaguar's most recent quality tracking study reveals that over 80% of buyers who have owned a Jaguar for a time period of 32 months would buy one again, a percentage Jaguar believes it can still improve.

Jaguar is understandably slow to introduce either new technology or styling.

And Dale estimates that even among those who bought Jaguar during the riskier period, at least two-thirds would not let any of the car's earlier faults drive them away permanently.

Rebecca Fannin

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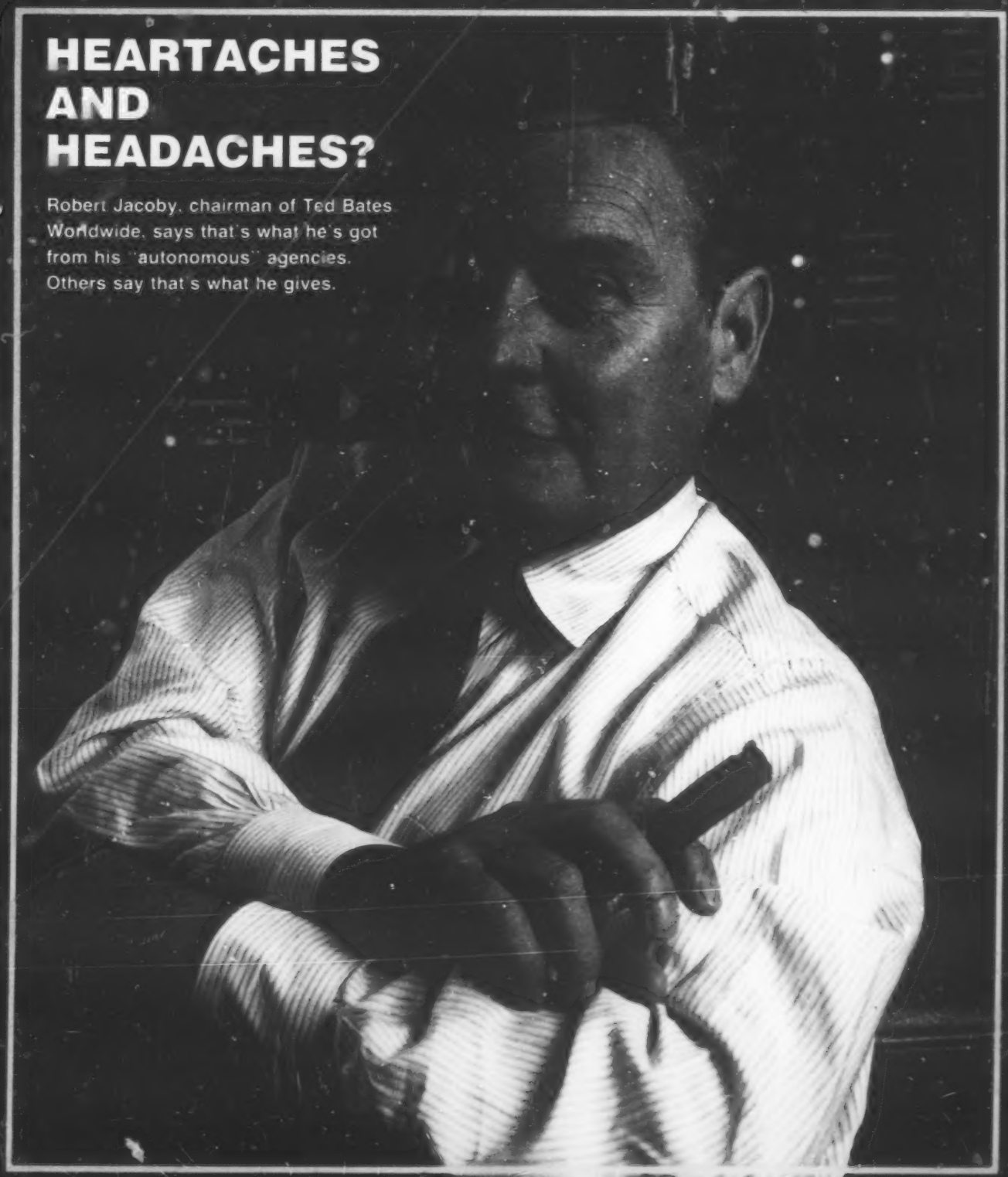
MARKETING & MEDIA Decisions

JULY 1985 • $3.00

THE TOP 200 BRANDS

HEARTACHES AND HEADACHES?

Robert Jacoby, chairman of Ted Bates Worldwide, says that's what he's got from his "autonomous" agencies. Others say that's what he gives.



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NEW ELECTRONIC MEDIA

Boom continues for VCR's

Nearly 68 million U.S. homes will have videocassette recorders by year-end 1994, claims Paul Kagan Associates' most recent evaluation of the VCR market. That would amount to a projected 68.5% of a potential 99 million tv-equipped households by that year. By the end of 1985, 23.3 million homes will own the technology, a growth of 9.3 million VCR homes over last year-end's total of 14 million. The 1985 figure would represent 27.4% VCR penetration of U.S. tv households (projected at 85 million by this year-end). Over the 10-year span, Kagan projects the growth of VCR homes to stagger above 190%, a total projected growth of 44.6 million VCR-owning homes. By comparison, basic cable tv subscribers, projected at 40.3 by year-end, could grow 48% to a 59.6 million over the 1985-1994 period.

Meanwhile, Link Resources also forecasts major growth for VCR's, along with home computers, cable tv, and telephones for the 1985-89 period. "The U.S. remains robust for the near term," says a recent Link analysis, "but that pattern is expected to parallel the British slowdown by 1986 or 1987." Link estimates that 7.5 million VCR units were shipped in the U.S. in 1984, an increase of 88% over 1983. By 1990, replacement and second-set VCR sales will account for an increase to 13.5 million units, which will be nearly 20% off the installed base at that time. As consumers become more price sensitive, low-end models are coming to the fore. With market share so closely related to price, vendors' margins are shrinking, note Link analysts. To offset this, vendors hope to push consumers up to higher-priced models offering such features as high fidelity and camcorder models, as well as late-generation models which offer enhanced images, longer playing times, and improved interface with other advanced technology.

Kagan's 10-year VCR numbers

Year	Cumulative VCR Homes	% of TVHH	Year	Cumulative VCR Homes	% of TVHH
1985	23.290 mil.	27.4%	1990	55.468 mil.	59.0%
1986	31.511	36.2	1991	58.964	61.7
1987	39.600	44.5	1992	62.099	64.0
1988	46.726	51.3	1993	65.053	66.4
1989	51.417	55.6	1994	67.863	68.5

© 1985 THE VCR LETTER, Paul Kagan Associates, Inc., Carmel, Calif.

More changes for Viewtron

Viewdata Corporation of America, whose Viewtron consumer base dropped from 3,100 late last year to a current 3,000, has changed its marketing package again. This time the videotex operator is offering access for $5 per hour to users of personal computers equipped with Viewtron software. The change accompanies Viewtron's launch of a NAPLPS software giveaway as part of a contract to distribute discs for videotex access this year.

The disc company, Addison Information Systems, hopes to put 250,000 of its NAPLPS packages for Commodore home computers on the market by 1986 as a part of a licensing agreement with Viewdata Corporation. VCA, which paid a one-time licensing fee for rights to a customized version of Addison's Commodore software, can now distribute the software in unlimited quantities without paying royalty fees.

Viewtron tried to rally consumer interest in its service with quarter-page ads in the *Miami Herald* and Fort Lauderdale and Palm Beach newspapers, offering free discs. About 1,000 Viewtron subscribers took advantage of the giveaway. However, videotex analyst Gary Arlen cites the skeptics' view that computer buffs could potentially erase those discs and use them for other program purposes.

Outlook for Home Electronic Media

Market	1984 IB**	1984 Shipments	1984 Revenues	1989 IB	1989 Shipments	1989 Revenues	Average Yearly Growth*** IB	Shipments	Revenues
Home Computers	11.4	5.0	$2,255	55.9	11.3	$5,937	78%	25%	33%
VCRs	16.6	7.5	3,643	60.6	9.0	3,600	53%	4%	—
Cable Tv Subscribers	35.5	4.0	3,799	48.4	1.4	7,585	7%	−13%	20%
Telephones	147.0	25.9	1,100	220.0	36.1	1,696	10%	8%	11%

* Units and dollars in millions. Dollar figures are not adjusted for inflation.
** Installed base
*** Represents the percent difference between 1989 and 1984 divided by five years.

FUTURES

Rocky times for micros

A recent survey by Software Industry Bulletin, a publication of Stamford, Conn.-based Digital Information Group, points to problems among the leading microcomputer companies. The group of 29 companies surveyed recorded a net loss of more than $17 million on sales of $1.3 billion in the first quarter. The companies derive at least 50% of their revenues from micro-related products in five major segments of the market: hardware, software, distribution, disk drive makers, and peripherals.

The SIB Market Index underscores the symptoms of the sagging health of the computer segment. Though the seven software publishers polled lead the index with a 12.3% profit margin, much of that is from Lotus. Excluding Lotus, the margin would be less than 3%. Similarly, though average net income leaped 75%, four companies posted net losses. Meanwhile, hardware sales, the key to softwares' future, have gone soft.

FIRST QUARTER SIB MARKET INDEX
(in $ millions)

	Revenue			Net Income		
SOFTWARE PUBLISHERS	1985	1984	Change	1985	1984	Change
Lotus Development	44.7	28.3	58.0%	9.6	7.5	28.5%
Ashton-Tate	27.2	13.5	100.6%	3.1	1.8	78.4%
MicroPro Int'l.	10.0	18.9	−47.1%	−0.67	3.1	−121.3%
Software Publishing	7.2	4.5	59.2%	0.97	0.49	97.2%
Activision	3.8	20.4	−81.1%	−1.2	−6.0	80.6%
Innovative Software	1.5	0.72	110.0%	−0.30	−0.16	−84.0%
American Ed. Computer	0.39	0.50	−20.8%	−0.42	−0.40	−4.7%
Subtotal	94.79	86.82	9.2%	11.08	6.33	75.0%
	Revenue			**Net Income**		
HARDWARE MAKERS	1985	1984	Change	1985	1984	Change
Apple Computer	435.3	300.1	45.1%	10.0	9.1	9.3%
Commodore Int'l.	168.3	326.2	−48.4%	−20.6	36.3	−157.3%
Compaq Computer	97.0	62.9	54.3%	4.6	3.3	41.7%
Convergent Tech.	92.6	55.7	66.4%	0.21	1.8	−88.7%
Altos Computers	30.7	28.9	6.2%	2.7	3.0	−10.0%
Kaypro Corp.	18.6	35.5	−47.8%	0.08	4.0	−97.9%
Fortune Systems	9.8	15.1	−35.0%	−3.8	−3.4	−11.7%
Eagle Computer	2.5	10.0	−74.8%	−1.6	−9.9	83.8%
Subtotal	854.8	834.4	2.4%	−8.61	44.2	−119.5%

Source: Digital Information Group

Toy market will tighten as boomlet grows up

The children of the Baby Boom will soon be putting away childish things, according to a study by Find/SVP, the New York-based information clearinghouse. And that spells bad news for the toy industry.

Last year's results give a mixed reading on the future of the toy market. Manufacturers' sales hit $8.8 billion, a 17% increase over the previous year, and 73% ahead of 1980's $5.1 billion in sales. But, explains Peter Allen, manager of marketing research reports, the industry isn't going to see that kind of boom in the next years. He attributes a projected average annual sales growth of 5% through 1990 to the "aging of the baby boomlet kids." As these children, now mostly under five years old, grow up, their interests will expand to other leisure-time products, such as sporting goods, movies, records and computers.

On the other hand, the type of toys bought last year seems to signal a lasting change: the renewed popularity of traditional toys. Unlike the early years of the decade, when electronic and video games were popular, today's children prefer the toys of old — dolls, board games, even die-cast figures. Sales of dolls and action figures, excluding the new robot toys, have tripled since 1981, to $2 billion last year. And games and puzzles are booming too: Trivial Pursuit, it seems, has spurred such an interest in this old-fashioned pastime that sales doubled last year, hitting the $1 billion mark.

Yet, notes the report, this retro chic sweeping through the industry may be deceiving toy marketers. "Kids are fickle," warns Allen, who points out that "the majority of sales advances are typically provided by products with life cycles of less than three years."

HOMEWORK

Doing more of what is good for us.

Americans are practicing more health and safety measures, particularly in the areas of stress control, home accident prevention and seat belt use. These trends are revealed in a new Louis Harris survey for *Prevention* magazine.

In its annual measure of the nation's efforts to prevent disease and accidents and promote good health and longevity, *Prevention* gives America a score of 63.2, an improvement of 1.7 points over last year's figure of 61.5. *Prevention* derives the scores on a scale of 0 to 100, looking at the total potential for prevention as measured by 21 key health-seeking behaviors.

Of the health behaviors measured, five showed a statistically significant improvement to last year's survey. Questioning 1,253 randomly selected adults about exercise, diet and nutrition, smoking and alcohol use, safety precautions, stress management and health screenings, the Louis Harris survey finds that what is especially revealing about American lifestyles is the proportion of those who state that they are taking steps to control stress in their lives. These efforts by adult Americans increased by 11 points, a sign that more are recognizing the role stress control plays in maintaining and enhancing health and well-being.

The survey also showed an improvement in efforts to avoid home accidents (up 9 points) as more Americans are seeking to improve home safety. A full 81% now say they take special steps to avoid accidents. Furthermore, 74% now have smoke detectors in their homes, up 7 points from last year.

Of the changes seen in the Harris survey, one of the most significant is the increase in seat belt use, up by 8 points, though the overall use figure is still only 27%. The researchers note that the improvement is particularly important in light of the fact that experts consider seat belt use as third in importance behind not smoking in general and not smoking in bed.

In addition, Americans seem to have driven faster in 1984 than in 1983. This year's survey shows a 4 point drop in the percentage of drivers (52%) who say they always drive at or below the speed limit. Though the researchers note that it is a small drop, it is statistically significant.

On the tobacco front, Harris finds that 72% of adults do not smoke cigarettes, the highest figure for non-smoking ever recorded in its surveys. Though not statistically different from the 70% recorded last year, this rate reflects a 15-point climb over the past decade.

But Harris notes there was little improvement in three areas that have traditionally shown low levels of practice: driving after drinking part of the time, staying within recommended weight range, and getting strenuous exercise.

Newspapers set new records in 1984

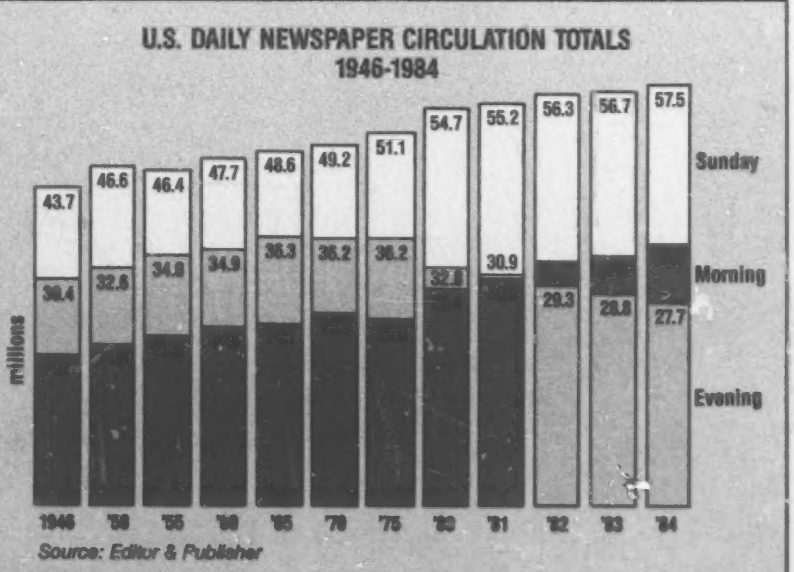
U.S. daily and Sunday newspaper circulation, the number of Sunday newspapers, newspaper advertising volume, and newspaper employment all reached record highs in 1984, according to "Facts about Newspapers '85," compiled by the American Newspaper Publishers Association.

The annual survey notes that daily newspaper circulation increased by almost 700,000 to a new high of 63,340,336. The previous high of 63,147,280 was recorded in 1973.

The number of Sunday newspapers increased by 11 to 783 with a record circulation of 57,511,975, an increase of more than 750,000.

Newspaper advertising volume, meanwhile, increased by more than 15% for the second consecutive year to reach a new high of $23.8 billion, an increase of $3.26 billion.

The ANPA also reports that newspaper employment reached a record of 443,000 in 1984, an increase of 15,000 over 1983 totals.



MARKETING & MEDIA Decisions

THE TOP 200 BRANDS

14TH ANNUAL REPORT on national advertising expenditures by brands in each of eight major media in 1983 and 1984

Key advertising decision makers for each brand in company marketing and agency media departments

Alphabetical index of the 200 most-advertised brands in the U.S.

Total expenditures of the Top 200 in 1981, 1982, 1983 and 1984

Analysis of major trends among the Top 200 Brands

INTRODUCTION TO TOP 200 BRANDS DIRECTORY

THIS REPORT is the fourteenth annual report by *Marketing & Media Decisions* of major brand activity, brand expenditures in each of the eight major media and the key media decision makers for each brand. The report accounts for nearly half the total dollars invested by national advertisers in the eight major national media, which are magazines, national Sunday magazines, newspapers, network tv, spot tv, network radio, spot radio and outdoor.

An alphabetical index, giving the ranking of each brand in order of total expenditures, appears below. The first section of the report shows brand, parent company, categories in which the brand spent most of its dollars and total expenditures in each year, 1981, 1982, 1983, and 1984.

The second section gives individual media expenditures for each brand in 1983 and 1984, categories in which the brand was most active (as defined by Leading National Advertisers), principal agencies, and media decision makers in companies and agencies.

The data are a special compilation by *Decisions* of best available expenditure estimates by Leading National Advertisers (LNA), Publishers Information Bureau (PIB), Broadcast Advertisers Reports (BAR), Media Records, Inc., Radio Expenditure Reports (RER), Institute of Outdoor Advertising and *Decisions* estimates.

Alphabetical index of the Top 200 brands

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PRICE OF ENTRY UP 16% FOR TOP 200 BRANDS

The biggest spending increase in nearly a decade was made by the 200 leading advertisers in 1984. The top 200 spent just over $11.8 billion among them — an increase of 18% over 1983 and the largest jump in any year since 1976's 27.5%. It was a real increase, as the media inflation rate for the year was 9.5%, and it was the second big boost in as many years as the leaders were up by 15% in 1983, with a media inflation rate that year of 8.9%.

There were 36 new entries in the top 200 (see table), despite the fact that the entry level jumped 16% over 1983, up to $21,005,000 from $18,110,000. Of the 36 new brands, only three had been in the top 200 in 1982.

Most of the year's big boost in expenditures came from the old regulars. Only three of the new brands were able to crack the first 100 — Sterling cigarettes, at number 55; Levi's, at 57; and Hasbro, squeaking in at number 99. The top 22 spent over $100 million each — a new record.

Sears, the perennial leader, retained the top spot. One change in the top five was made by AT&T, which went from fifth to third as it continued to advertise the new units resulting from the breakup of the old Bell system. The breakup spawned other changes on the top 200 list: Six of the seven regional, corporate groupings created by the phone company made the charts, with each spending within the $23-$37 million range.

There was only one new entrant in the top 10. IBM continued its meteoric rise on the chart, going from 17th place to ninth on the basis of an $86 million increase in spending. It had already risen from 50th to 17th in 1983. And while there was some shuffling of order in the top 25, the only other addition was from the rejuvenated auto industry: Oldsmobile checking in at number 25, after spending some $26 million more than it had the year before.

The most dramatic changes in this year's top 200 came from home electronics and the always volatile field of cigarettes. With the bottom falling out of the electronic games market, Coleco, Texas Instruments and Atari all came crashing down from the lofty heights they had reached in recent years. Coleco reduced its spending from almost $46 million to $19 million, while Texas Instruments went from $68 million to $9 million. Both plunged off the charts. Atari managed to hang onto the 182nd spot, down from 25th.

In cigarettes, the large amount spent by R.J. Reynolds to get Sterling on the list was more than offset by some draconian cuts by other brands. The most noticeable was Players, introduced by Philip Morris to the tune of $65 million in 1983, good for 30th place. It proved to be a shooting star in 1984, disappearing with expenditures of only $17 million. Reynolds' Bright brand took a similar nosedive, spending less than $14 million and going off the chart after finishing 31st in 1983 with over $63 million. B.A.T's Barclay dropped from $34 million to $10 million, and finished out of the money. Lorillard brands Kent and Satin took somewhat less dramatic cuts, but fell out of the top 200 as well.

Among the other big budget cutters was S.C. Johnson's, which was 99th in 1983, but nowhere in 1984 after cutting its expenditures in half. Parker Brothers decreased even more, losing its 111th place ranking as it went from $31 million to $13 million. Merrill Lynch was decidedly bearish, dropping its expenditures from $19 million to less than $8 million. Apparently school was out for scandal — *National Enquirer* cut its spending by $4.5 million.

On the more positive side, there were huge increases by nearly all of the top 25. One of the most notable was made by Toyota, which spent about $46 million more to drive up from 19th to 15th place and reverse a cut of $22 million in 1983. The 12 leading advertisers all spent between $34 and $100 million more than they had the year before.

Further down in the leading 200, there were other success stories. Panasonic more than doubled its spending, to go from 199th to 83rd. Seven-Up spent $15 million more, to go from 132nd to 84th. Hanes went from 168th to 100th on the strength of a $17 million increase.

Some auspicious debuts in the top 200 were made. LA beer, the new, low alcohol brew introduced by Anheuser-Busch in 1984, was 155th, with a budget of nearly $26 million. Crystal Light powdered drink mix nearly tripled its expenditures, to squeeze onto the list at 197th. And BMW bounced back on the list after a year's absence. The Bavarian automaker spent $15.5 million more, to finish 111th.

Kevin Baker

Brands that made it, brands that didn't
1984 vs. 1983

The Ins			The Outs		
Advil	Hasbro	NCR	Avis	Johnson's (S.C.)	Planters
Ameritech	Heineken	NYNEX	Barclay	Jordache	Players
Amoco	Hertz	Pacific Telesis	Bayer	Kal Kan	Sanka
Amtrak	Hewlett-Packard	7-Eleven	Bright	Kent	Satin
Bell Atlantic	ITT	Sharp	Brim	Mennen	Taster's Choice
Bell South	Jeep	Shell	Coleco	Merrill Lynch	Texas Instruments
Black & Decker	LA	Southwestern Bell	Dexatrim	The National Enquirer	Texize
Blue Cross/Blue Shield	Levi's	Stayfree	Digital	Nature Valley	Tide
BMW	Listerine	Sterling	Dristan	New Freedom	Timex
Crystal Light	Maxithins	Vidal Sassoon	Finesse	Pabst	True
Del Monte	Meister Brau	Volvo	Florida citrus	Paramount	United Artists
Estee Lauder	Mitsubishi	Wang	Gallo	Parker Bros.	Vicks

Top 200 Millionaire Brands 1981-1982-1983-1984

BRAND NAME (PARENT COMPANY)	CLASSIFICATION	1984	1983	1982	1981
1. **Sears** (Sears, Roebuck and Co.)	Retail	$633,261,000	$537,442,000**	$556,068,000	$505,372,000
2. **K mart** (K mart Corp.)	Retail	448,905,000	383,459,000	325,302,000	301,096,000
3. **AT&T** (AT&T)	Communications	422,463,000	303,709,000	161,756,000	171,783,000
4. **Penney's** (J.C. Penney)	Retail	402,352,000	341,990,000	288,563,000	269,621,000
5. **Ford** (Ford Motor Co.)	Cars, trucks	342,924,000	304,768,000	253,733,000	223,505,000
6. **Chevrolet** (General Motors)	Cars, trucks	268,970,000	208,334,000	185,170,000	156,465,000
7. **McDonald's** (McDonald's Corp.)	Restaurants	263,544,000	193,358,000	163,206,000	138,046,000
8. **Wards** (Mobil Corp.)	Retail	212,149,000	178,239,000	167,878,000	170,940,000
9. **IBM** (Intl. Business Machines)	Office machines, computers	189,264,000	103,358,000	46,424,000	31,215,000
10. **Nissan** (Nissan Motors Ltd.)	Cars, trucks	174,046,000	139,529,000	111,258,000	82,529,000
11. **Kellogg's** (Kellogg Co.)	Cereals, bakery goods	158,798,000	116,470,000	96,530,000	90,696,000
12. **Dodge** (Chrysler Corp.)	Cars, trucks	152,033,000	102,957,000	65,376,000	67,067,000
13. **Budweiser** (Anheuser-Busch)	Beer	149,623,000	131,782,000	104,897,000	67,037,000
14. **Miller** (Philip Morris)	Beer	144,699,000	125,028,000	113,276,000	86,108,000
15. **Toyota** (Toyota Motors)	Cars, trucks	141,930,000	96,019,000	118,036,000	121,232,000
16. **Kraft** (Dart & Kraft, Inc.)	Cooking products, dairy, prepared foods	137,895,000	109,875,000	107,051,000	96,902,000
17. **Burger King** (Pillsbury Co.)	Restaurants	134,444,000	89,377,000	65,165,000	48,797,000
18. **American Express** (American Express)	Financial, travel	121,099,000	63,810,000	54,362,000	47,310,000
19. **Honda** (Honda Motor Co.)	Cars, cycles, garden equip.	109,507,000	103,843,000	83,172,000	52,140,000
20. **Coca-Cola** (Coca-Cola U.S.A.)	Soft drinks	107,773,000	73,061,000	55,611,000	46,879,000
21. **Kodak** (Eastman Kodak)	Cameras, office machines	100,440,000	90,585,000	61,987,000	65,126,000
22. **Purina** (Ralston Purina)	Pet food, supplies	100,254,000	107,628,000	94,605,000	63,905,000
23. **Pepsi-Cola** (PepsiCo)	Soft drinks	99,582,000	86,110,000	65,984,000	53,751,000
24. **Chrysler** (Chrysler Corp.)	Cars	98,580,000	115,541,000	101,983,000	81,515,000
25. **Oldsmobile** (General Motors)	Cars	86,078,000	62,079,000**	55,782,000	52,062,000

* New product in first year shown ** Revised figures

Sources

Consumer magazines and national Sunday magazines: Data summarized from the PIB Magazine Analysis prepared by Leading National Advertisers Inc. (LNA) of actual linage run in those publications. Expenditures are based on current one-time gross rates before discounts. Rates for national full-run insertions are based on ad size and coloration. Rates for regional and less than full-run insertions are determined by LNA editors based on circulation and rates supplied by the magazines. Covered are more than 135 consumer magazines and three national Sunday magazines, plus tear sheets of over 1,500 regional editions a year.

Newspapers: Data compiled by Media Records, which measured every ad in 213 daily and Sunday newspapers. Actual linage is multiplied by the applicable one-time general open-line rate. Dollar estimates include newspaper supplements, color comic sections, rotogravure, all color ads. *Marketing & Media Decisions* has added estimates of local expenditures in newspapers by the five leading chain retailers because the extent of their operations makes their brands, in effect, "nationally" advertised as well as distributed.

Network tv and network radio: Data secured by Broadcast Advertisers Reports (BAR), which monitors all network broadcasts except those of the Mutual radio network. Material is collected on audio tape and then translated into a sequential listing. Network tv and network radio rates are based on estimates provided by the three networks of per-minute cost for time and talent.

Spot tv: Data secured by Broadcast Advertisers Reports (BAR) from listening posts in 75 top markets that monitor 303 stations for one week each month. These weekly records are projected to estimates of monthly spot tv usage. Spot tv rates are applied from a station rate deck that is constantly updated by agency buyers. The estimates represent about 90% of the dollars in spot tv.

Spot radio: Data generated by Radio Expenditure Reports (RER) are calculated from a sample of 2,300 stations in 210 markets. RER's sources are 15 leading radio reps handling station groups which supply quarterly computer runs of the spots aired by station, by market, and by brand of product spots aired. Estimates cover more than 90% of total national spot radio.

Outdoor: Data are based on information submitted to Leading National Advertisers (LNA) at the request of the Institute of Outdoor Advertising by outdoor plant operators in markets of 100,000 population or over. Covered is about 80% of total national outdoor advertising expenditures.

Brand dollar estimates are retabulated by *Decisions* by major brand name from the data just described. This represents the one place where brand data from all these sources are presented together. The brand data in greater detail is also available from each of the organizations that compile the data. Leading National Advertisers publishes detailed listings of the information on magazines, national Sunday magazines, network tv, spot tv, network radio, and outdoor. References to LNA classifications are provided throughout this report for further reference in LNA's reports: Company/Brand $; Class/Brand $.

The 200 team

Project editor: Patrick Kelly
Research editors: Kevin Baker, Susan Holt

BRAND NAME (PARENT COMPANY)	CLASSIFICATION	1984	1983	1982	1981
26. **Marlboro** (Philip Morris)	Cigarettes	$ 84,608,000	$ 70,590,000	$ 75,865,000	$ 59,356,000
27. **Apple** (Apple Computer)	Computers, data processing equipment	83,686,000	27,124,000	9,668,000	9,555,000
28. **Buick** (General Motors)	Cars	78,644,000	60,759,000	48,503,000	45,216,000
29. **Mercury** (Ford Motor Co.)	Cars	77,626,000	71,724,000	39,115,000	45,107,000
30. **Wendy's** (Wendy's International)	Restaurants	75,721,000	52,205,000	33,412,000	26,375,000
31. **Pontiac** (General Motors)	Cars	73,939,000	73,420,000	53,658,000	48,698,000
32. **Canon** (Canon U.S.A.)	Cameras, business machines	72,286,000	52,469,000	42,551,000	33,225,000
33. **GE** (General Electric)	Major appliances	70,598,000	57,691,000	40,675,000	69,998,000
34. **American Airlines** (AMR Corp.)	Passenger travel, air cargo	68,498,000	51,103,000	51,564,000	45,661,000
35. **General Motors** (General Motors)	Corporate, parts	66,993,000	56,203,000	61,465,000	35,211,000
36. **RCA** (RCA Corp.)	Home electronics, records and tapes	65,748,000	51,374,000	32,736,000	57,687,000
37. **Michelob** (Anheuser-Busch)	Beer	64,775,000	37,602,000**	53,597,000	44,847,000
38. **Merit** (Philip Morris)	Cigarettes	64,210,000	41,357,000	66,037,000	75,228,000
39. **Kentucky Fried Chicken** (Reynolds)	Restaurants	63,343,000	51,326,000	44,059,000	36,551,000
40. **Volkswagen** (Volkswagenwerk A.G.)	Cars, trucks	63,042,000	61,906,000**	64,599,000	50,476,000
41. **Delta** (Delta Airlines)	Passenger travel	62,759,000	60,627,000	45,653,000	39,772,000
42. **Tylenol** (Johnson & Johnson)	Medicines	61,963,000	56,847,000	43,987,000	36,766,000
43. **Vantage** (R.J. Reynolds)	Cigarettes	61,368,000	42,419,000	42,087,000	58,393,000
44. **Mazda** (Toyo Kogyo)	Cars, trucks	61,083,000	50,708,000	52,683,000	25,552,000
45. **Nabisco** (Nabisco Brands)	Bakery, prepared foods, confectionery	60,476,000	44,562,000	33,399,000	30,508,000
46. **Pizza Hut** (PepsiCo)	Restaurants	58,995,000	47,868,000	35,737,000	24,574,000
47. **United Airlines** (UAL)	Passenger travel, air cargo	58,906,000	54,017,000	60,455,000	47,497,000
48. **Xerox** (Xerox Corp.)	Office machines, computers	56,054,000	57,655,000	41,734,000	29,532,000
49. **Coors** (Adolph Coors Co.)	Beer	55,364,000	51,205,000	28,179,000	29,819,000
50. **Mattel** (Mattel Inc.)	Games, toys	55,343,000	70,405,000	85,064,000	41,782,000
51. **Plymouth** (Chrysler Corp.)	Cars	53,271,000	32,575,000**	27,164,000	30,397,000
52. **Renault** (American Motors)	Cars	52,875,000	48,883,000	34,026,000	15,199,000
53. **Revlon** (Revlon)	Cosmetics, hair products	52,392,000	43,202,000	30,948,000	28,871,000
54. **Cadillac** (General Motors)	Cars	52,210,000	46,014,000	36,091,000	36,669,000
55. **Sterling** (R.J. Reynolds)	Cigarettes	51,721,000*	—	—	—
56. **Warner** (Warner Communications)	Motion pictures, home electronics, publishing	51,375,000	39,130,000	29,391,000	33,481,000
57. **Levis** (Levi Strauss & Co.)	Clothing	51,041,000	14,120,000	19,191,000	22,598,000
58. **Benson & Hedges** (Philip Morris)	Cigarettes	50,361,000	41,132,000	66,816,000	35,871,000
59. **Wrigley** (Wm. Wrigley, Jr.)	Gum	50,165,000	44,597,000	48,547,000	43,275,000
60. **Eastern** (Eastern Air Lines)	Passenger travel	50,140,000	61,527,000	51,234,000	43,486,000
61. **Post** (General Foods)	Cereals	49,559,000	45,177,000	58,635,000	45,956,000
62. **Pillsbury** (Pillsbury Co.)	Bakery, cooking products, prepared foods	48,732,000	43,705,000	41,550,000	36,480,000
63. **Camel** (R.J. Reynolds)	Cigarettes	47,603,000	39,632,000	37,834,000	34,269,000
64. **Lipton** (Thomas J. Lipton/Lever Bros.)	Prepared foods, beverages	47,188,000	33,033,000	30,947,000	35,111,000
65. **Cover Girl** (Noxell Corp.)	Cosmetics	46,458,000	38,568,000	31,760,000	24,333,000
66. **Clairol** (Bristol-Myers)	Hair products	45,940,000	47,300,000	51,670,000	46,944,000
67. **Jell-O** (General Foods)	Desserts	45,849,000	38,409,000	32,890,000	34,009,000
68. **Nestle's** (Nestle Enterprises)	Confectionery, beverages, cooking products	45,414,000	44,061,000**	28,752,000	33,278,000
69. **Anacin** (American Home Products)	Medicines	45,403,000	44,593,000	55,669,000	44,641,000
70. **Duncan Hines** (Procter & Gamble)	Baking mixes	45,375,000	28,392,000	20,689,000	20,648,000
71. **Goodyear** (Goodyear Tire & Rubber)	Tires, parts	45,323,000	39,203,000	28,630,000	27,570,000
72. **Stroh's** (Stroh Brewery)	Beer	44,937,000	36,896,000	14,052,000	13,127,000
73. **L'Oreal** (Cosmair Inc.)	Cosmetics, hair products	43,901,000	30,243,000	21,182,000	11,947,000
74. **U.S. Postal Service** (U.S. Govt.)	U.S. Government	43,547,000	33,400,000	18,440,000	13,853,000
75. **Kool** (B.A.T. Industries)	Cigarettes, events	43,347,000	46,933,000	74,323,000	19,886,000

* New product in first year shown
** Revised figures

Top 200 Millionaire Brands 1981-1982-1983-1984

BRAND NAME (PARENT COMPANY)	CLASSIFICATION	1984	1983	1982	1981
76. **TWA** (Trans World Airlines)	Passenger travel	$ 43,175,000	$ 39,339,000	$ 39,327,000	$ 37,269,000
77. **Campbell's** (Campbell Soup)	Prepared foods	43,082,000	35,965,000	32,781,000	23,644,000
78. **CBS** (CBS Inc.)	Communications, records and tapes	42,726,000	27,053,000	33,488,000	30,635,000
79. **ABC** (Capital Cities)	Communications	42,657,000	33,987,000	24,989,000	32,145,000
80. **Ivory** (Procter & Gamble)	Soaps, hair products	42,636,000	31,832,000	27,208,000	24,563,000
81. **Lincoln** (Ford Motor Co.)	Cars	41,966,000	23,069,000**	26,793,000	15,680,000
82. **Du Pont** (E.I. du Pont)	Manufactured materials, fibers, fabrics	41,716,000	37,878,000**	32,816,000	39,985,000
83. **Panasonic** (Matsushita Electric)	Small appliances, home electronics, office machines	41,654,000	18,993,000**	15,422,000	11,898,000
84. **Seven-Up** (Philip Morris)	Soft drinks	41,465,000	26,278,000	32,734,000	37,923,000
85. **True Value** (Cotter & Co.)	Hardware retail	41,275,000	33,853,000	28,442,000	23,602,000
86. **Winston** (R.J. Reynolds)	Cigarettes	40,924,000	48,961,000	53,168,000	67,655,000
87. **U.S. Army** (U.S. Army Recruit. Comm.)	U.S. Government	39,974,000	31,125,000	28,265,000	24,239,000
88. **MCI** (MCI Communications)	Communications	39,789,000	35,971,000	22,474,000	9,937,000
89. **Hershey** (Hershey Foods)	Ingredients, candies	39,568,000	23,836,000	23,831,000	20,372,000
90. **Columbia** (Coca-Cola)	Motion pictures	39,481,000	42,090,000	34,041,000	39,831,000
91. **GTE** (GTE Corp.)	Communications	38,468,000	25,691,000	13,009,000	3,033,000
92. **Betty Crocker** (General Mills)	Baking mixes, prepared foods, cooking products	38,165,000	32,553,000	24,100,000	20,628,000
93. **Hallmark** (Hallmark Cards)	Greeting cards	37,902,000	20,899,000	17,520,000	14,541,000
94. **Midas** (IC Industries)	Auto parts and supplies	37,836,000	32,035,000	23,339,000	18,563,000
95. **Federal Express** (Federal Express)	Air cargo	37,573,000	25,178,000	22,705,000	18,577,000
96. **Taco Bell** (PepsiCo)	Restaurants	37,487,000	22,244,000	13,248,000	11,874,000
97. **Subaru** (Subaru of America/Fuji)	Cars	37,479,000	32,508,000	27,158,000	21,422,000
98. **Mercedes-Benz** (Mer.-Benz of N.A.)	Cars	37,467,000	38,911,000	19,718,000	13,041,000
99. **Hasbro** (Hasbro Inc.)	Games, toys	37,171,000	19,537,000	14,741,000	10,251,000
100. **Hanes** (Hanes Corp./Sara Lee Corp.)	Hosiery, underwear	37,122,000	20,376,000**	17,045,000	14,332,000
101. **Columbia Records** (CBS)	Records and tapes	36,821,000	32,574,000	28,574,000	24,655,000
102. **More** (R.J. Reynolds)	Cigarettes	36,730,000	41,394,000	40,822,000	44,106,000
103. **NBC** (RCA Corp.)	Communications	36,668,000	27,703,000**	27,104,000	32,515,000
104. **Universal City** (MCA, Inc.)	Motion pictures	36,060,000	31,337,000	32,894,000	27,598,000
105. **Quaker** (Quaker Oats)	Cereals	35,965,000	34,831,000	23,690,000	16,289,000
106. **Kleenex** (Kimberly-Clark)	Toiletries	35,526,000	27,361,000	24,150,000	20,036,000
107. **Commodore** (Commodore Intl.)	Office machines, computers, electronics	34,915,000	61,221,000	15,610,000	1,228,000
108. **Folger's** (Procter & Gamble)	Coffee	34,770,000	26,281,000	27,651,000	27,209,000
109. **Maybelline** (Schering-Plough)	Cosmetics	34,678,000	30,283,000	28,069,000	29,473,000
110. **Southwestern Bell** (Southwestern Bell Corp.)	Communications	33,975,000	13,437,000	24,951,000	18,592,000
111. **BMW** (Bavarian Motor Works)	Cars, cycles	33,595,000	18,051,000	20,776,000	11,629,000
112. **Whirlpool** (Whirlpool Corp.)	Major appliance	32,749,000	20,225,000	20,286,000	15,337,000
113. **20th Century-Fox** (20th Century-Fox Film Corp.)	Motion pictures	32,722,000	38,330,000	33,988,000	22,727,000
114. **7 Eleven** (Southland Corp.)	Retail	32,672,000	25,879,000	20,732,000	18,982,000
115. **Time** (Time Inc.)	Publishing, media	32,595,000	28,399,000	17,333,000	30,879,000
116. **Lysol** (Sterling Drug)	Cleansers, disinfectants	32,523,000	33,420,000	23,511,000	18,584,000
117. **Crest** (Procter & Gamble)	Dental supplies	32,462,000	37,997,000	39,270,000	45,888,000
118. **Salem** (R.J. Reynolds)	Cigarettes	32,380,000	44,296,000	61,551,000	48,811,000
119. **NYNEX** (NYNEX Corp.)	Communications	32,176,000	18,522,000	18,610,000	11,023,000
120. **Blue Cross/Blue Shield** (Blue Cross/Blue Shield)	Medical insurance	31,663,000	29,136,000	26,010,000	13,199,000

* New product in first year shown
** Revised figures

Top 200 Millionaire Brands 1981-1982-1983-1984

BRAND NAME (PARENT COMPANY)	CLASSIFICATION	1984	1983	1982	1981
121. **Seagram** (Seagram Distillers Co.)	Liquor, wine, soft drinks	$ 31,344,000	$ 26,140,000	$ 34,279,000	$ 39,128,000
122. **Johnson's** (Johnson & Johnson)	Baby products, shampoo, lotions, hygiene	31,157,000	30,134,000	30,451,000	34,704,000
123. **Heinz** (H.J. Heinz Co.)	Condiments, gravies	31,043,000	26,932,000	25,793,000	17,683,000
124. **Red Lobster** (General Mills)	Restaurants	30,981,000	32,898,000	28,626,000	25,814,000
125. **Sprite** (Coca-Cola)	Soft drinks	30,975,000	26,753,000	16,810,000	12,343,000
126. **L'eggs** (Hanes Corp./Sara Lee Corp.)	Hosiery	30,939,000	26,189,000	22,876,000	16,215,000
127. **Virginia Slims** (Philip Morris)	Cigarettes	30,613,000	31,947,000	41,355,000	31,523,000
128. **Allstate** (Sears, Roebuck and Co.)	Insurance	30,380,000	25,950,000	21,491,000	21,280,000
129. **American** (American Motors)	Cars	30,267,000	18,433,000	19,138,000	29,588,000
130. **Pacific Telesis** (Pacific Telesis Group)	Communications	30,220,000	7,224,000	7,952,000	8,857,000
131. **TV Guide** (Triangle)	Magazines	30,083,000	31,250,000	20,902,000	16,202,000
132. **Century** (R.J. Reynolds)	Cigarettes	29,898,000	27,659,000*	—	—
133. **Polaroid** (Polaroid Corp.)	Cameras, video equipment, office machines	29,647,000	33,826,000	37,854,000	40,527,000
134. **Bell South** (Bell South Corp.)	Communications	29,589,000	10,503,000	13,752,000	10,903,000
135. **Maxwell House** (General Foods)	Coffee	29,314,000	31,412,000	51,578,000	45,609,000
136. **Tab** (Coca-Cola)	Soft drinks	29,203,000	24,152,000	19,766,000	16,691,000
137. **Gillette** (Gillette Company)	Toiletries, shaving products	29,180,000	37,593,000	27,139,000	31,885,000
138. **Heineken** (Van Munching & Co. Inc.)	Beer	28,834,000	22,454,000	16,703,000	10,824,000
139. **Stouffer's** (Nestle Enterprises)	Prepared foods	28,776,000	24,795,000	22,637,000	16,741,000
140. **Now** (R.J. Reynolds)	Cigarettes	28,447,000	26,115,000	31,635,000	35,002,000
141. **Volvo** (Volvo AB)	Cars, trucks	28,133,000	19,929,000	12,813,000	14,385,000
142. **Crisco** (Procter & Gamble)	Cooking products	28,029,000	33,492,000	21,850,000	20,885,000
143. **Colgate** (Colgate-Palmolive)	Personal hygiene	28,002,000	35,347,000**	32,359,000	29,691,000
144. **Duracell** (Dart & Kraft)	Household batteries	27,826,000	23,219,000**	20,553,000	16,093,000
145. **Ameritech** (Ameritech)	Communications	27,722,000	11,225,000	12,960,000	15,061,000
146. **MasterCard** (MasterCard Intl.)	Credit card	27,573,000	18,935,000	14,999,000	12,494,000
147. **Kool-Aid** (General Foods)	Soft drinks	27,352,000	26,343,000	20,911,000	24,951,000
148. **Franklin Mint** (Warner Comm.)	Mail order	27,194,000	32,831,000	25,461,000	25,258,000
149. **Mitsubishi** (Mitsubishi Corp.)	Cars, trucks, televisions	26,529,000	21,394,000	8,163,000	3,625,000
150. **Alka-Seltzer** (Miles Labs/A.G. Bayer)	Medicines	26,500,000	21,235,000	18,475,000	21,180,000
151. **Hardee's** (Imasco Ltd.)	Restaurants	26,498,000	18,169,000	11,191,000	8,670,000
152. **Pampers** (Procter & Gamble)	Underwear	26,471,000	24,023,000	20,061,000	19,834,000
153. **Eveready** (Union Carbide Corp.)	Household batteries	26,375,000	23,650,000	25,465,000	31,900,000
154. **American Dairy Association**	Dairy products	26,263,000	22,111,000	23,352,000	18,324,000
155. **LA** (Anheuser-Busch)	Beer	25,827,000*	—	—	—
156. **Jeep** (American Motors)	Cars, trucks, jeeps	25,659,000	23,142,000	13,016,000	10,985,000
157. **Sony** (Sony Corp.)	Home electronics	25,650,000	39,383,000	23,319,000	29,697,000
158. **Kenner** (General Mills)	Games, toys	25,571,000	25,509,000	23,874,000	23,522,000
159. **Keebler** (United Biscuits)	Cookies, crackers	25,557,000	19,482,000	12,110,000	8,785,000
160. **NCR** (NCR Corp.)	Computers	25,501,000	12,027,000	962,000	816,000
161. **Clorox** (Clorox Co.)	Laundry preparations	25,005,000	23,171,000	29,012,000	27,578,000
162. **Listerine** (Warner-Lambert Co.)	Mouthwash	24,944,000	14,408,000	12,650,000	11,333,000
163. **Wang** (Wang Labs Inc.)	Computers, office machines	24,861,000	9,086,000	5,099,000	5,119,000
164. **Advil** (American Home Products)	Medicines	24,628,000*	—	—	—
165. **ITT** (Intl. Telephone & Telegraph)	Communications, computers	24,554,000	14,200,000	15,024,000	2,260,000
166. **Shell** (Royal Dutch/Shell Group)	Gas, oil, pest control	24,427,000	11,217,000	22,548,000	21,466,000
167. **Reynolds** (Reynolds Metals)	Food wraps and foils	24,366,000	23,413,000	13,194,000	9,889,000
168. **Safeway** (Safeway Food)	Retail	24,298,000	22,141,000	21,968,000	23,419,000
169. **Prudential** (Prudential Insurance Co.)	Insurance, finance	24,220,000	24,778,000	15,156,000	14,353,000
170. **Exxon** (Exxon Corp.)	Gas, oil	24,002,000	25,155,000	25,432,000	41,512,000

* New product in first year shown
** Revised figures

Top 200 Millionaire Brands 1981-1982-1983-1984

BRAND NAME (PARENT COMPANY)	CLASSIFICATION	1984	1983	1982	1981
171. **Milton Bradley** (Hasbro, Inc.)	Games, toys	$ 23,963,000	$ 21,670,000	$ 21,321,000	$ 22,309,000
172. **Hewlett-Packard** (Hewlett-Packard Co.)	Computers	23,658,000	14,182,000	5,486,000	4,621,000
173. **Luvs** (Procter & Gamble)	Underwear	23,582,000	18,376,000	20,497,000	17,982,000
174. **Black & Decker** (Black & Decker Man. Co.)	Tools, household supplies	23,549,000	13,595,000	12,222,000	14,011,000
175. **Stayfree** (Johnson & Johnson)	Feminine hygiene	23,416,000	12,025,000	16,520,000	18,250,000
176. **De Beers** (De Beers Con. Mines)	Jewelry	23,166,000	21,167,000	19,624,000	15,326,000
177. **Sprint** (GTE Corp.)	Communications	23,153,000	21,535,000	11,256,000*	—
178. **Oil of Olay** (Richardson-Vicks)	Cosmetics	23,067,000	21,919,000	27,598,000	37,171,000
179. **Cheerios** (General Mills)	Cereals	23,064,000	20,789,000	20,421,000	14,614,000
180. **Bell Atlantic** (Bell Atlantic Corp.)	Communications	22,990,000	6,438,000	10,044,000	8,739,000
181. **Aqua-Fresh** (Beecham)	Toothpaste	22,973,000	24,538,000	27,263,000	21,620,000
182. **Atari** (Atari Corp.)	Games, home electronics	22,933,000	72,694,000	86,338,000	30,660,000
183. **Kroger** (Kroger Co.)	Retail	22,884,000	19,532,000	15,305,000	12,548,000
184. **Amtrak** (Nat. Railroad Passenger Corp.)	Railroad	22,752,000	21,289,000	16,138,000	15,291,000
185. **Swanson** (Campbell Soup)	Meats, poultry, fish, prepared foods	22,159,000	21,376,000	10,944,000	4,122,000
186. **Del Monte** (R.J. Reynolds)	Foods	21,966,000	13,548,000	14,671,000	7,593,000
187. **Hertz** (RCA Corp.)	Car rentals	21,963,000	24,390,000	18,316,000	16,817,000
188. **Sharp** (Sharp Corp.)	Computers, office machines, home electronics	21,897,000	17,387,000	9,617,000	9,915,000
189. **Ragu** (Cheesebrough-Pond's)	Sauces, prepared mixes	21,866,000	19,442,000	24,120,000	16,238,000
190. **Estee Lauder** (Estee Lauder Inc.)	Cosmetics	21,739,000	17,684,000	12,125,000	10,819,000
191. **Lowenbrau** (Philip Morris)	Beer	21,680,000	24,915,000	24,115,000	20,788,000
192. **Weight Watchers** (H.J. Heinz)	Prepared foods	21,640,000	18,110,000	14,440,000	7,585,000
193. **Mobil** (Mobil Oil)	Gas, oil	21,436,000	20,029,000	23,940,000	25,245,000
194. **Meister Brau** (Philip Morris)	Beer	21,308,000	12,224,000*	—	—
195. **Republic** (Republic Airlines)	Passenger travel	21,300,000	27,020,000	21,574,000	11,463,000
196. **Woolworth** (F.W. Woolworth)	Retail	21,280,000	22,135,000	93,517,000	41,796,000
197. **Crystal Light** (General Foods)	Drink mix	21,256,000	7,152,000	436,000*	—
198. **Vidal Sassoon** (Richardson-Vicks Inc.)	Hair products	21,221,000	14,205,000	20,466,000	10,291,000
199. **Maxithins** (Tambrands)	Feminine hygiene	21,075,000	17,057,000	12,418,000	1,087,000
200. **Amoco** (Standard Oil of Indiana)	Gas, oil	21,005,000	14,730,000	15,853,000	16,242,000

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THE INDUSTRY'S MEDIA ALMANAC

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